Automotive OEM App Store 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-oem-app-store-market
> **Scraped Date:** 2026-09-17

Executive Market Summary

Market Metric	Details
Base Market Size	USD 9.59 billion
Projected Forecast (2031)	USD 9.59 billion
Growth Rate (CAGR)	8.27 %
Largest Market Region	N/A
Fastest-Growing Region	N/A

Market Visualizations & Infographics

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![Major players in Automotive OEM App Store industry](images/chart_2.png)

![Automotive OEM App Store Market Size](images/chart_3.png)

![Automotive OEM App Store Market Share by Service Type, 2025](images/chart_4.png)

![Automotive OEM App Store Market Share by Vehicle Type, 2025](images/chart_5.png)

![Automotive OEM App Store Market Growth Rate by Region](images/chart_6.png)

![Automotive OEM App Store 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)
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Comprehensive Research Analysis

Overview Points List Flex 49 Share Feature End

Market Overview

Study Period
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2019 - 2031
|

Market Size (2026)
|

USD 9.59 Billion
|

Market Size (2031)
|

USD 14.27 Billion
|

Growth Rate (2026 - 2031)
|

8.27 %
|

Fastest Growing Market
|

Asia-Pacific
|

Largest Market
|

North America
|

Market Concentration
|

Medium
|

Major Players

*Disclaimer: Major Players sorted in no particular order

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Market Overview
Automotive OEM App Store Market Analysis by Mordor Intelligence

The Automotive OEM App Store Market was valued at USD 8.86 billion in 2025 and is projected to grow from USD 9.59 billion in 2026 to USD 14.27 billion by 2031, at a CAGR of 8.27% during the 2026–2031 forecast period. Intensifying competition to deliver software-defined vehicles, rising subscription uptake, and looming data-access mandates are accelerating platform revenues. The EU Data Act’s September 2026 enforcement window is dismantling data monopolies and obliging automakers to open real-time vehicle data to external developers, shifting rivalry toward curation quality and revenue-share terms. Navigation apps still anchor revenue, but Gen Z’s appetite for seamless in-car payments is pushing Payment and Purchase apps toward outsized growth. At the same time, third-party developers dominate code volume, even as BMW, Mercedes-Benz, and Toyota scale up proprietary stores to control margins.

Key Report Takeaways

* By service type, Map and Navigation secured 43.27% of the Automotive OEM App Store market share in 2025, whereas Payment and Purchase are projected to expand at an 8.29% CAGR through 2031.

* By development type, third-party/outsourced development commanded a 68.65% share of the Automotive OEM App Store market in 2025, while in-house development is the fastest-growing at an 8.31% CAGR to 2031.

* By vehicle type, passenger cars accounted for 73.23% of the Automotive OEM App Store market size in 2025, and light commercial vehicles are poised to see the highest CAGR at 8.34% between 2026 and 2031.

* By operating system, Android held 76.36% Automotive OEM App Store market share in 2025; iOS implementations are forecast to climb at an 8.38% CAGR over the same horizon.

* By geography, North America led with 38.54% Automotive OEM App Store market share in 2025, yet Asia-Pacific is set to record the strongest CAGR at 8.41% through 2031.

Key Market Trends

Market Trends and Insights

Drivers Impact Analysis of Automotive OEM App Store Market*

Driver |

(~) % Impact on CAGR Forecast |

Geographic Relevance |

Impact Timeline |

OEM Shift to Software-Defined Vehicles and Recurring Revenue

|

+2.1%
|

North America & EU core, expanding to APAC
|

Long term (≥ 4 years)
|

Soaring Connected-Car Penetration

|

+1.8%
|

Global, with APAC and Europe leading adoption
|

Medium term (2-4 years)
|

Android Ecosystem Accelerating Third-Party App Availability

|

+1.5%
|

Global, concentrated in markets with Google Automotive Services partnerships
|

Short term (≤ 2 years)
|

EU Data Act Opening In-Vehicle Data Access

|

+1.2%
|

EU mandatory, spillover to UK and select APAC markets
|

Medium term (2-4 years)
|

Gen Z Demand for In-Car Digital Commerce and Payments

|

+0.9%
|

North America, Western Europe, urban APAC
|

Medium term (2-4 years)
|

5G/Edge APIs Enabling Immersive Cockpit Apps

|

+0.7%
|

APAC core (China, South Korea), North America metro areas
|

Long term (≥ 4 years)
|

Source: Mordor Intelligence
|

Competitive Landscape

Competitive Landscape

The automotive OEM app store market is moderately fragmented, with three competitive tiers. First, vertically integrated OEMs such as Tesla, BYD, and GM capture end-to-end software value by controlling both the platform and the content layer. Second, Tier-1 suppliers, including FORVIA Appning, Harman Ignite, and Visteon, offer white-label marketplaces that smaller brands use to achieve faster time-to-market. Third, hyperscale cloud providers such as AWS and Google supply back-end services and developer tools that support catalog growth, making them quiet but important enablers across the ecosystem.

Strategic moves continue to reshape market positioning. FORVIA completed a 100% acquisition of Faurecia Aptoide Automotive in April 2024, rebranding it as Appning and targeting a 35% global market share of the automotive app store segment by 2030[3]"FORVIA acquires 100% of Faurecia Aptoide Automotive and confirms market leadership," FORVIA, forvia.com. Harman's agreement with Volkswagen's CARIAD supports the VW Group Application Store. It establishes Ignite as a flagship reference, while BMW selected AWS for its Neue Klasse automated-driving stack, integrating cloud AI into future app services. These moves reflect how quickly alliances are forming across the value chain.

Underserved opportunities remain in commercial-fleet telematics, EV-charging orchestration, and vehicle-to-home IoT, areas where no single player has established a dominant position. Smaller entrants, such as Legible, which partnered with ACCESS Europe's Twine4Car in December 2024 to stream audiobooks, demonstrate that focused content offerings can still secure OEM shelf space despite growing platform consolidation. For agile players, these niches represent realistic entry points into a market that larger incumbents have not yet fully addressed.

Automotive OEM App Store Industry Leaders

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Faurecia Aptoide Automotive

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Google LLC

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Harman International

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Visteon Corporation

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Apple Inc.

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*Disclaimer: Major Players sorted in no particular order

Component Component 3 Scope Of The Report Bottom

Global Automotive OEM App Store Market Report Scope

The Automotive OEM App Store market is segmented by store type, application, vehicle type, connectivity, and region. By Store Type, the market is segmented into Proprietary OEM App Stores and Third-Party Collaborated Stores. By Application, the market is segmented into Navigation and Maps; Infotainment and Entertainment; Vehicle Diagnostics and Maintenance; Productivity and Utilities; and Smart Home and IoT Integration. By Vehicle Type, the market is segmented into Passenger Cars, Light Commercial Vehicles, and Heavy Commercial Vehicles. By Connectivity, the market is segmented into Embedded Systems and Tethered/Integrated Smartphone Apps. By Region, the market is segmented into North America (United States, Canada, and Rest of North America), South America (Brazil, Argentina, and Rest of South America), Europe (United Kingdom, Germany, France, Spain, Italy, Russia, and Rest of Europe), Asia-Pacific (India, China, Japan, South Korea, and Rest of Asia-Pacific), and Middle East and Africa (United Arab Emirates, Saudi Arabia, Turkey, Egypt, South Africa, and Rest of Middle East and Africa).

The Market Forecasts are Provided in Terms of Value (USD).

By Service Type

Map and Navigation
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In-vehicle Entertainment (podcast, music, audio)
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News and Magazines
|

Payment and Purchase
|

Business / Productivity
|

Other Service Types (games, dealer locator, etc.)
|

Segmentation Accordion Item

By Geography

North America
|

United States
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Canada
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Rest of North America
|

South America
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Brazil
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Argentina
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Rest of South America
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Europe
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Germany
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United Kingdom
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France
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Spain
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Italy
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Netherlands
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Russia
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Rest of Europe
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Asia-Pacific
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China
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India
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Japan
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South Korea
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Australia
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New Zealand
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Rest of Asia-Pacific
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Middle East and Africa
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United Arab Emirates
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Saudi Arabia
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Turkey
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South Africa
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Nigeria
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Rest of Middle East and Africa
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Frequently Asked Questions

What are the current market value and growth rate of the Automotive OEM App Store Market?

The Automotive OEM App Store Market size was valued at USD 8.86 billion in 2025 and is projected to expand from USD 9.59 billion in 2026 to USD 14.27 billion by 2031, registering a CAGR of 8.27% between 2026 and 2031.

Why do many automakers favor Android Automotive OS over other platforms?

Android's Car App Library, multi-display support, and Google Automotive Services integration shorten developer time-to-market, helping OEMs expand catalogs quickly.

What risks slow the roll-out of new cockpit apps?

Cyber-security certification under ISO/SAE 21434 and driver-distraction limits, such as NHTSA's 2-second glance rule, frequently extend approval timelines.

Which region is expected to post the highest growth rate by 2031?

Asia-Pacific is forecast for an 8.41% CAGR as Chinese and Japanese manufacturers scale proprietary ecosystems and India enforces connected-car mandates.

How are Tier-1 suppliers positioning themselves in this space?

Companies like FORVIA Appning and Harman Ignite provide white-label marketplaces that let smaller brands enter the Automotive OEM App Store market without building full in-house stacks.