



The Global Automotive OEM Telematics Market

10th Edition

The Global Automotive OEM Telematics Market is the tenth consecutive report from Berg Insight analysing the latest developments on the connected car market worldwide. This strategic research report from Berg Insight provides you with 270 pages of unique business intelligence including 5-year industry forecasts and expert commentary on which to base your business decisions.

The number of connected cars with embedded OEM telematics systems is expected to surpass 500 million by 2029

Berg Insight's definition of a car telematics system in this report is an automatic system designed for passenger cars that incorporates some form of cellular communications. Several categories of car telematics applications are now offered by carmakers. Examples include eCall and roadside assistance, stolen vehicle tracking (SVT), vehicle diagnostics, over-the-air (OTA) updates, connected navigation and infotainment, entertainment services such as music and video streaming, convenience services, Wi-Fi hotspots as well as AI personal assistance services. Convenience services include remote control of vehicle functions such as door lock/unlock, vehicle preconditioning (heating or cooling of the passenger compartment before a trip), EV charging management and finding the last parking position.

Virtually all of the world's leading carmakers have launched mass-market services in key regions today. Berg Insight estimates that 79 percent of all new cars sold worldwide in 2024 were equipped with an OEM-embedded telematics system, up from 75 percent in 2023. The eCall mandate in EU27+EFTA+UK has accelerated the adoption of telematics, making it a standard feature in nearly all new cars sold in the region in 2024. By 2025, the attach rate in EU27+EFTA+UK is expected to reach 100 percent, up from 97 percent in 2024. North America is an advanced market in terms of premium telematics services with an attach rate of about 93 percent. In China, the attach rate reached 84 percent in 2024. Other developed markets include Russia and CIS, Japan and South Korea. In other regions, the attach rate is still around 30–40 percent.

Since many volume brands such as Toyota, GM, Stellantis, Ford, Volkswagen, Hyundai, Honda and Nissan now offer connected services for free in their main markets, they will constitute a large part of the growth of connected car subscriptions in the coming years. Premium brands such as BMW, Mercedes-Benz and Audi have offered telematics services as a standard feature across models and geographies for more than a decade and have a considerable number of subscribers. Other major car brands offering embedded telematics on a broad scale include Kia, Tesla, Renault, Geely, BYD, Volvo Cars, Mazda, JLR, SAIC, GWM, Chery, Subaru, Porsche, Lexus and Changan Motors. Relatively newly founded brands in China such as Leapmotor, Li Auto and NIO also offer embedded telematics services.

Berg Insight estimates that total shipments of embedded OEM telematics systems reached 64.5 million units worldwide in 2024. Growing at a compound annual growth

rate of 4.9 percent, shipments are expected to reach 82.1 million units in 2029. During the same time, the attach rate of embedded telematics units is forecasted to increase from about 79 percent in 2024 to 93 percent in 2029. The number of embedded telematics subscriptions is forecasted to grow at a compound annual growth rate of 13.0 percent from 286.6 million in 2024 to 528.1 million in 2029.

Car manufacturers rely on services provided by mobile network operators, MVNOs, connectivity management platform providers and telematics service providers. Mobile operators and MVNOs such as AT&T, Vodafone, China Unicom, China Mobile, KDDI, Deutsche Telekom, Orange, Verizon, Cubic and NTT are leading connectivity providers in the automotive segment. Connectivity management platforms is also an important part of the connected car ecosystem enabling features such as provisioning, subscription management, cost monitoring and event management. Leading connectivity management platforms players in the automotive industry include Cisco, Aeris, Airlinq and Lolo Company.

Telematics service providers in the OEM segment have established partnerships with multiple telematics system vendors to enable connected car services for car manufacturers across an international footprint. Examples of telematics service providers focusing on the automotive OEM segment include Beijing Yesway Information Technology, Bosch, Cerence AI, Forvia, Harman International, Here Technologies, PATEO, Sibros, SiriusXM Connect, Sonatus, TomTom, Valtech Mobility and WirelessCar. There are also companies specialising in building connected car services and applications upon connected car data. Examples of such companies include Caruso, CCC Intelligent Solutions, High Mobility, LexisNexis Risk Solutions and Smartcar.

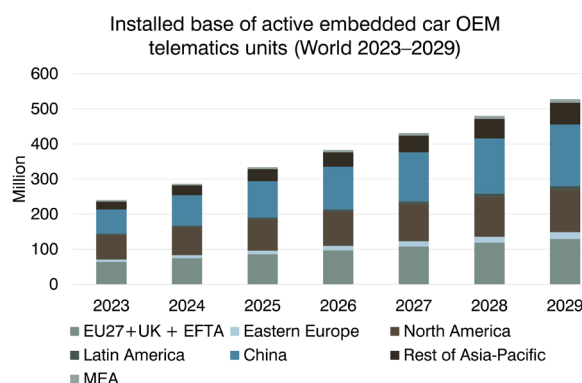


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Glossary

Highlights from the report

Insights from 30 executive interviews with market leading companies.

New data on car populations and new car registrations worldwide.

Comprehensive overview of the car OEM telematics value chain and key applications.

In-depth analysis of market trends and key developments.

Detailed profiles of 25 major car OEMs and their telematics propositions.

Updated market forecasts by region lasting until 2029.

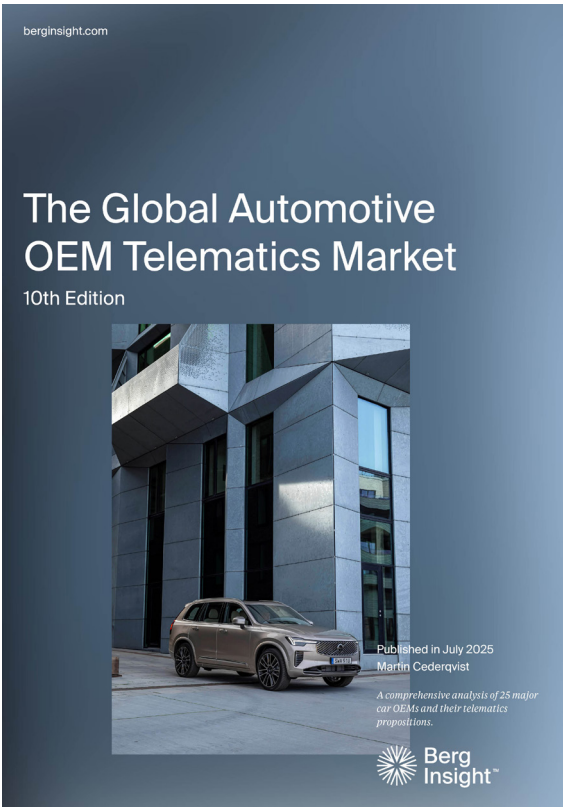
The report answers the following questions

- What is the current status of the car OEM telematics industry?
- Which are the key OEM telematics applications?
- Which are the leading telematics service providers?
- How are mobile operators and MVNOs positioning themselves in the telematics value chain?
- What telematics offerings are available from the leading car OEMs today?
- What business models are used by car OEMs?
- How will connected car data consumption evolve in the next years?
- How will the market evolve in Europe, North America, Latin America, Asia-Pacific and MEA?



About Berg Insight's IoT market research

Our market reports offer comprehensive information and analysis on key IoT technologies and markets, addressing important concerns including total addressable market, market penetration, market shares, industry landscape, regulatory environment, market trends and forecasts. Our research portfolio today comprises more than 80 items, where each market report focuses on a specific vertical application area or cover horizontal themes. All market reports come with complementary data sets in Excel format that can be easily analysed and converted into tables and charts. We offer a range of different license options together with bundled packages and subscriptions to suit your specific needs.



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The Global Automotive OEM Telematics Market

What are the latest trends on the global car OEM telematics market? Berg Insight estimates that 78 percent of all cars sold worldwide in 2024 were equipped with OEM embedded telematics. Examples of applications include eCall and roadside assistance, stolen vehicle tracking, vehicle diagnostics, connected navigation and infotainment, Wi-Fi hotspot, convenience applications, over-the-air updates, in-vehicle payments, UBI and rental fleet management. Get up to date with the latest industry trends in this new 270-page report.

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Who should read this report?

The Global Automotive OEM Telematics Market is the foremost source of information about the rapid adoption of car telematics. Whether you are a car manufacturer, telematics service provider, telecom operator, content provider, investor, consultant, or government agency, you will gain valuable insights from our in-depth research.

AUTHOR

Martin Cederqvist

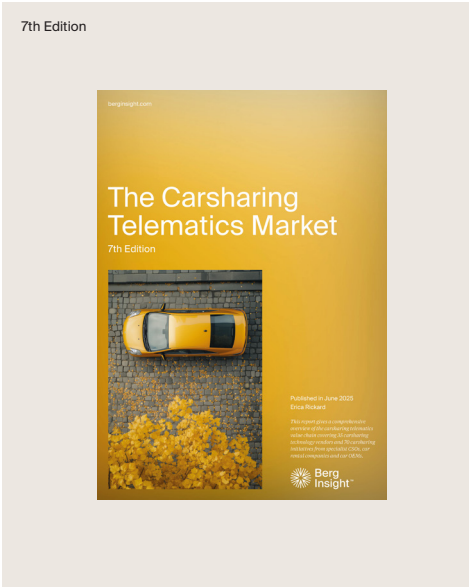


Martin is a senior analyst covering mainly the automotive sector. He performs strategic analysis of OEM and aftermarket car telematics services, data monetisation services such as insurance telematics and shared mobility, among many other topics. Martin holds a Master's degree in Industrial Engineering and Management from Chalmers University of Technology and joined Berg Insight in 2022.

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