The Automotive Digital Cockpit Market

1st Edition

The Automotive Digital Cockpit Market is a comprehensive report from Berg Insight analysing the latest developments on the digital cockpit market worldwide covering 24 car OEMs and 34 suppliers. This strategic research report from Berg Insight provides you with 160 pages of unique business intelligence including 5-year industry forecasts and expert commentary on which to base your business decisions.

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Annual shipments of cockpit domain controllers to reach 49.5 million by 2030

The digital cockpit is one of the most rapidly evolving areas of automotive technology. The functional scope of the digital cockpit includes the instrument cluster, infotainment displays, head-up displays, passenger displays, physical and touch-based input systems, voice interaction and in-cabin sensing functions. Automotive OEMs today offer increasingly sophisticated digital cockpit experiences, which include larger displays, more advanced user interfaces and AI-enabled functions. In order to support increasingly sophisticated digital cockpit experiences, OEMs need more powerful and more integrated cockpit electronics architectures. Such architectures are powered by cockpit domain controllers (CDCs). These enable consolidation of functions that were previously handled by separate ECUs and provide the compute capacity needed for advanced graphics, multi-display management, voice assistants, connectivity services, in-cabin monitoring and AI-enabled user experiences.

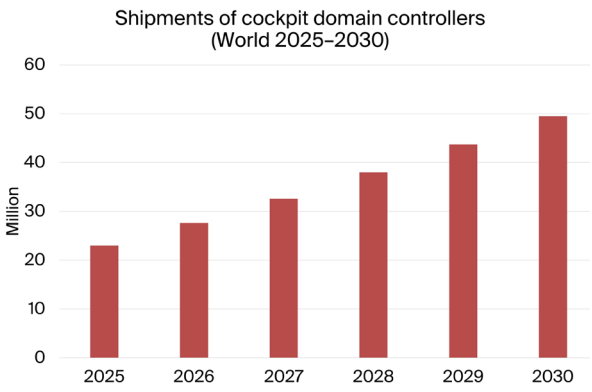
In this report, a CDC is defined as an SoC-based cockpit compute unit that consolidates in-vehicle infotainment with at least one additional cockpit subsystem or display domain within one controller architecture. Berg Insight estimates that annual shipments of CDCs reached 23.0 million in 2025, corresponding to an attach rate of 26.4 percent. Annual shipments of CDCs are expected to grow at a CAGR of 16.5 percent to reach 49.5 million in 2030 as an increasing number of OEMs and vehicle models adopt CDC-based cockpit architectures. The CDC market value is expected to grow from € 9.9 billion in 2025 to reach € 19.4 billion in 2030.

The digital cockpit has become an increasingly important part of OEMs' value propositions and the digital cockpit is increasingly leveraged to differentiate the driver experience. Automotive OEMs differ significantly in terms of maturity, technology sourcing and degree of in-house control. Premium manufacturers are generally taking the lead when it comes to the adoption of highly integrated cockpit systems. Mass-market OEMs are following the approach to some degree. The Chinese OEMs are today at the forefront and rapidly adopt new intelligent cockpit platforms, AI assistants and high-performance cockpit SoCs across a broad range of models.

The supplier ecosystem that enables the underlying compute architecture in a digital cockpit includes Tier 1 suppliers, semiconductor vendors and software platform providers. An important role of Tier 1 suppliers in the digital cockpit market is to act as the system integrator for the complete solution including the hardware and software stack. Leading Tier 1 suppliers in the digital cockpit industry include Aptiv, Aumovio, Autolink, Bosch, Denso, Desay SV, ECARX, Forvia, Harman International, Hyundai Mobis, Joynext, LG Electronics, Marelli, Panasonic Automotive Systems, PATEO, Valeo and Visteon.

Semiconductor providers are gaining an increasingly important role in the industry as the demand for compute performance continues to increase. Modern digital cockpit platforms require high-performance SoCs capable of supporting advanced graphics, multiple displays, AI workloads, voice interaction, connectivity services and increasingly complex software stacks. Leading cockpit domain controller providers include AMD, Intel, MediaTek, NVIDIA, NXP Semiconductors, Qualcomm, Renesas Electronics, Samsung Electronics and Telechips.

The role of the cockpit software platform and middleware providers are also becoming more important. Cockpit software platform and middleware technologies are leveraged to run instrument clusters, infotainment systems, head-up displays, voice assistants, connectivity functions and vehicle services on shared compute platforms. The supplier scope includes real-time operating systems, hypervisors, middleware, integration tools and related software services. Examples of leading cockpit software platform and middleware providers include Elektrobit (Aumovio), ETAS, Green Hills Software, KPIT, QNX (BlackBerry), TrustMotion (NXP), Vector Informatic and Wind River (Aptiv).



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Insights from numerous executive interviews with market leading companies.

New data on car populations and new car registrations worldwide.

Comprehensive overview of the digital cockpit value chain.

In-depth analysis of market trends and key developments.

Detailed profiles of 24 major car OEMs and their digital cockpit strategies.

Market forecasts by region lasting until 2030.

The report answers the following questions

- What is the current status of the digital cockpit market?
- What are the key drivers of cockpit electronics and compute platform consolidation?
- What digital cockpit strategies are leveraged by the leading car OEMs today?
- Which companies are the leading technology providers in the digital cockpit ecosystem?
- How are cockpit domain controllers changing digital cockpit architectures and ecosystems?
- How will the market evolve in Europe, North America, China, Japan, South Korea and RoW?
- How will emerging AI technologies impact the development of digital cockpits?
- Which are the key future trends in this industry?

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 85 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 Automotive Digital Cockpit Market

The digital cockpit has become an increasingly important part of car OEMs' value proposition and is increasingly leveraged to differentiate the driver experience. Berg Insight estimates that annual shipments of cockpit domain controllers (CDCs) reached 23.0 million in 2025, corresponding to an attach rate of 26.4 percent. Annual shipments of CDCs are expected to grow at a CAGR of 16.5 percent to reach 49.5 million in 2030. The CDC market value is expected to grow from € 9.9 billion in 2025 to reach € 19.4 billion in 2030. Get up to date with the latest industry trends in this new 160-page report.

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Who should read this report?

The Automotive Digital Cockpit Market is the foremost source of information about the rapid adoption of increasingly advanced digital cockpits in the automotive industry. Whether you are a car manufacturer, tier 1 supplier, connectivity service provider, content provider, investor, consultant, or government agency, you will gain valuable insights from our in-depth research.

AUTHOR

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Martin is an Senior Analyst covering the automotive sector including OEM and aftermarket car telematics services, autonomous driving, digital cockpits, 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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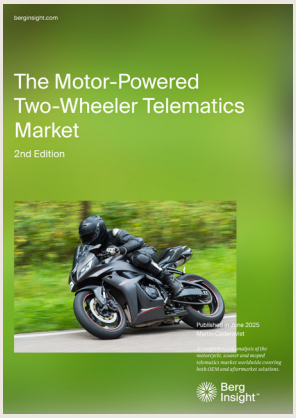

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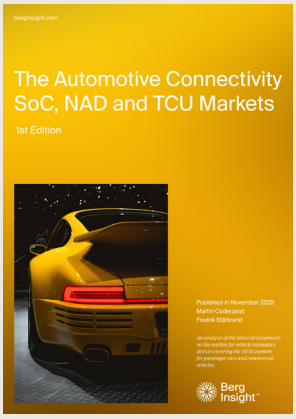

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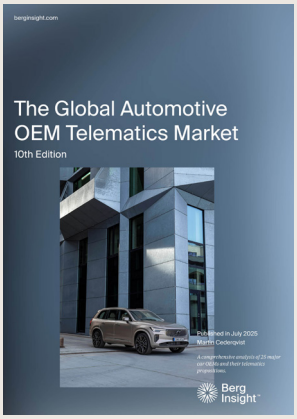

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