



The Global Automotive OEM Telematics Market

11th Edition

The Global Automotive OEM Telematics Market is the eleventh 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.



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The number of connected cars with embedded OEM telematics systems is expected to reach 580 million by 2030

Several categories of connected car 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. Virtually all of the world's leading carmakers have launched mass-market connected services in key regions today. Berg Insight estimates that 83 percent of all new cars sold worldwide in 2025 were equipped with embedded connectivity, up from 79 percent in 2024. The eCall mandate in EU27+EFTA+UK has accelerated the adoption of connected car technology, making it a standard feature in all new cars sold in the region in 2025. North America is an advanced market in terms of connected car services with an estimated attach rate of 94 percent. In China, the attach rate reached an estimated 90 percent in 2025. 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/Kia, Honda and Nissan now offer connected services for free in their main markets, they will constitute a large part of the growth of connected cars in the coming years. Premium brands such as BMW, Mercedes-Benz and Audi have offered connected services as a standard feature across models and geographies for more than a decade and have a considerable number of connected cars today. Other major car brands offering connected services on a broad scale include Tesla, Renault, Geely, BYD, Volvo Cars, Mazda, JLR, SAIC, GWM, Chery, Subaru, Skoda, Porsche, Lexus and Changan Motors. Relatively newly founded brands in China such as Leapmotor, Li Auto and NIO also offer embedded connected services.

Berg Insight estimates that total shipments of cars equipped with embedded connectivity reached 72.6 million units worldwide in 2025. Shipments are expected to reach 82.6 million units in 2030. During the same time, the attach rate of embedded connectivity is forecasted to increase from about 83 percent in 2025 to 91 percent in 2030. The number of active OEM telematics SIM cards is forecasted to grow at a CAGR of 11.5 percent from 338.0 million in 2025 to 583.1 million in 2030.

Car manufacturers rely on services provided by mobile network operators, MVNOs, connectivity management platform providers and connected vehicle software and platform providers. Mobile operators and MVNOs such as AT&T, Vodafone, China Unicom, China Mobile, KDDI, Deutsche Telekom, Orange, Verizon, Cubic3 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, Airling and Lolo Company.

Connected vehicle platform and service providers support OEMs in the development, deployment and operation of connected car services. The category includes connected vehicle platform providers offering cloud back-end, vehicle-to-cloud connectivity, OTA updates, diagnostics, data management and service orchestration capabilities. It also includes automotive technology suppliers providing infotainment, telematics, digital cockpit, voice assistant and connected-service software. Leading providers in this segment include Beijing Yesway Information, Bosch, Cerence AI, Forvia, Harman International, HERE Technologies, Mapbox, 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, High Mobility, LexisNexis Risk Solutions, Motorq and Smartcar.

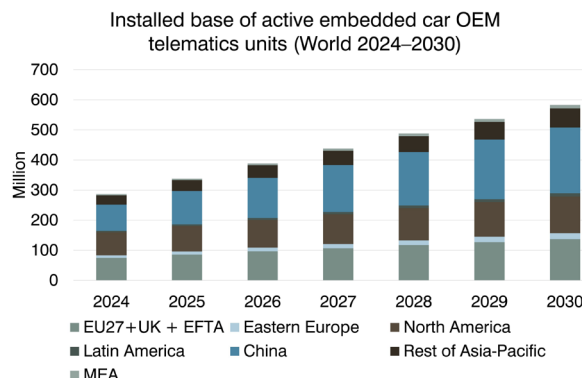


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Glossary

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 2030.

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 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 Global Automotive OEM Telematics Market

What are the latest trends on the global car OEM telematics market? Berg Insight estimates that 83 percent of all cars sold worldwide in 2025 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 **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.

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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.

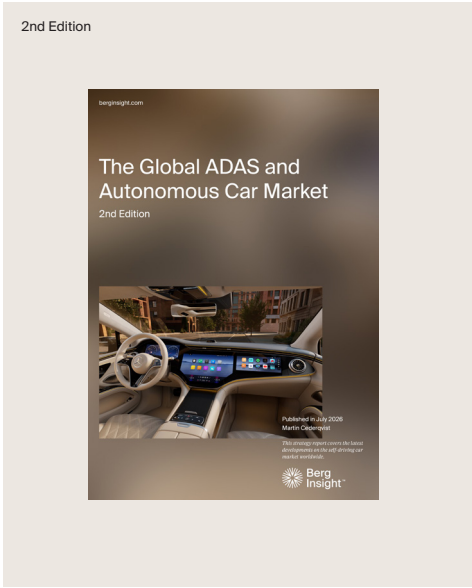
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