

The Automotive Connectivity SoC, NAD and TCU Markets

2nd Edition

The Automotive Connectivity SoC, NAD and TCU Markets is a strategy report from Berg Insight covering the OEM segment for passenger cars and commercial vehicles. This strategic research report from Berg Insight provides you with 100 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 total TCU market to reach € 11.8 million in 2030

Virtually all of the world's leading vehicle OEMs have launched mass-market connected services in key regions today. Connected vehicles rely on a telematics control unit (TCU), which provides communications between the vehicle and external networks and navigation satellite systems. Berg Insight estimates that global shipments of TCUs for both passenger cars and commercial vehicles reached 82.5 million units in 2025. Growing at a CAGR of 2.8 percent, global shipments are expected to reach 94.5 million units in 2030. The total global market value of TCUs is forecasted to grow from € 9.0 billion in 2025 to € 11.8 billion in 2030. Berg Insight estimates that 83 percent of all new passenger cars and commercial vehicles sold worldwide in 2025 were equipped with a TCU, up from 78 percent in 2024. The vast majority of all sold TCUs today feature 4G LTE connectivity, though many OEMs have adopted 5G TCUs for the next generation of vehicles. 5G RedCap TCUs are also expected to become increasingly popular in the coming years, as the form factor offers lower hardware costs than conventional 5G TCUs while providing a cost-effective migration path to 5G networks and sufficient performance for most connected car services. Berg Insight expects that about 82 percent of the shipped TCUs will be 5G eMBB or 5G RedCap in 2030.

The OEM hardware telematics ecosystem spans TCU vendors, network access device (NAD) vendors and system-on-chip (SoC) suppliers. The value chain is characterised by powerful actors at both ends. Vehicle OEMs hold substantial leverage over their suppliers and dictate both technical specifications and commercial terms. At the opposite end, SoC suppliers maintain significant bargaining power, underpinned by high technological barriers to entry and a highly concentrated market structure. Consequently, NAD and TCU vendors operate in a constrained middle ground between dominant upstream and downstream players. These players must continuously balance the competing demands of OEMs and SoC suppliers, adapting their designs and business terms to maintain these relationships. Success in this environment largely depends on flexibility, technical agility and the ability to align closely with OEM requirements while effectively managing SoC supplier dependencies.

The design and development of TCUs is complex as these have to integrate with other vehicle systems, fulfil strict quality standards and ensure performance during the long lifecycle of a vehicle model. For this reason, TCUs are generally developed by established automotive suppliers in cooperation with car manufacturers. Berg Insight ranks LG Electronics as the leading TCU vendor in terms of shipments. Aumovio and Harman were the runners-up, both holding significant market shares. Other major TCU vendors include Actia, Bosch, Denso, Desay SV, Gosuncn WeLink, Huawei, Lan-You Technology, Marelli, Neusoft Corporation and Valeo.

Important players in the TCU ecosystem include SoC vendors and NAD module vendors. The automotive connectivity SoC segment is heavily dominated by Qualcomm, which has long-standing relationships with all of the largest NAD module vendors, TCU suppliers and automotive OEMs. MediaTek ranks second and has strategically pivoted its IoT business towards high-end 5G applications, with a strong focus on the automotive sector in recent years. Other important automotive connectivity SoC vendors are China-based UNISOC, ASR Microelectronics and Huawei's HiSilicon as well as Samsung Electronics. The SoCs are in turn integrated into NAD modules. NAD module developers include both specialised cellular module providers, as well as TCU vendors that operate as vertically integrated TCU makers with in-house NAD module design capabilities. Quectel is the leading provider of NAD modules for the automotive industry, followed by Rolling Wireless and the TCU vendors LG Electronics and Aumovio. Other major NAD module vendors include specialised module vendors like Kontron, Fibocom, MeiG and Compal.

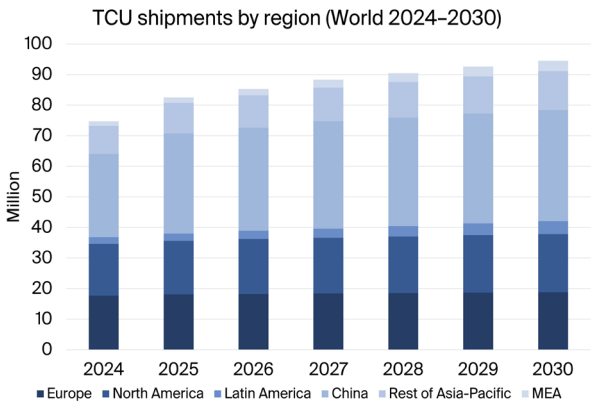


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Glossary

Hightlights from the report

Insights from numerous interviews with market leading companies.

Comprehensive overview of the TCU value chain.

In-depth analysis of market trends and key developments.

Detailed profiles of 29 TCU, NAD and SoC vendors.

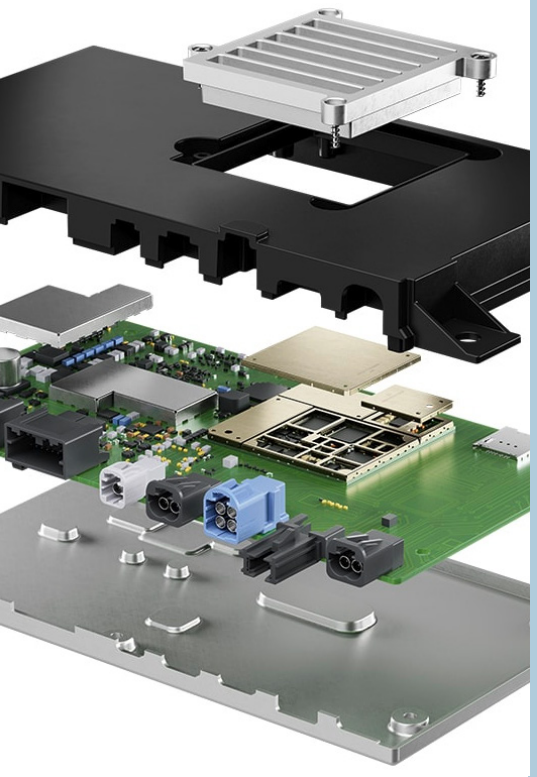
Market share data covering the leading TCU, NAD and SoC vendors.

New data on vehicle populations and new vehicle registrations worldwide.

Market forecasts by region lasting until 2030.

This report answers the following questions

- Which are the leading providers of TCUs, SoCs and NADs and what are their market shares?
- What is the split between 4G LTE, 5G and 5G RedCap TCU shipments in the next years?
- What is the outlook for emerging technologies such as satellite IoT?
- How will the market evolve in Europe, North America, Latin America, Asia-Pacific and MEA?
- How is the geopolitical environment impacting the TCU industry?
- Which are the drivers and barriers on the global TCU market?
- 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.



AUTOMOTIVE

The Automotive Connectivity SoC, NAD and TCU Markets

This report focuses on the hardware part of the connected vehicle value chain, and specifically the devices installed by the passenger car and commercial vehicle OEMs. Berg Insight estimates that global shipments of TCUs for both passenger cars and commercial vehicles reached 82.5 million units in 2025. Growing at a CAGR of 2.8 percent, global shipments are expected to reach 94.5 million units in 2030. Get up to date with the latest industry trends in this new 100-page strategy report from Berg Insight.

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Who should read this report?

The Automotive Connectivity SoC, NAD and TCU Markets is the foremost source of information about the passenger car and commercial vehicle telematics hardware market for OEM installation. Whether you are a telematics hardware vendor, vehicle telematics service provider, vehicle manufacturer, telecom operator, investor, consultant, or government agency, you will gain valuable insights from our in-depth research.

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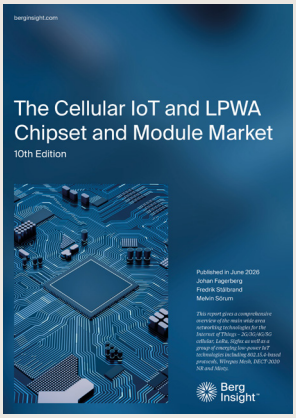
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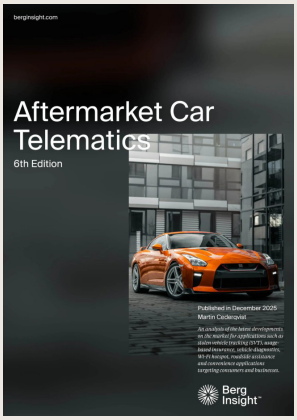
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