

INTELLIGENT COCKPIT MARKET SIZE ANALYSIS 2026

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Intelligent Cockpit is an intelligent car driving and riding space, providing users with a comfortable and convenient driving space and safe and reliable driving support. It mainly consists of intelligent devices such as In-Vehicle Infotainment, Cockpit Display System, Head-Up Display System, Streaming Rearview Mirror, Dashcam and Rear LCD Display. As people's demand for automotive comfort, safety and convenience gradually increases, the intelligent cockpit market is growing.

The penetration rate of the main components of the intelligent cockpit gradually increases and the penetration rate gradually slows down. Until 2026, the penetration rate of In-Vehicle Infotainment is expected to reach 98.6%, with full coverage of applications in passenger cars. In 2020, the penetration rate of Cockpit Display System is 26.9%, and in 2026 it is expected to reach 65.8%, covering more than half of the number of passenger cars. In 2020, the penetration rates of Head-Up Display System, Streaming Rearview Mirror, Dashcam and Rear LCD Display are 8.6%, 7.5%, 12.9% and 1.1%, respectively. In 2026, the penetration rate is expected to reach 34.1%, 29.5%, 49.7% and 8.1%.

Chart 1 Penetration Rates of All Segments of the Global Smart Cockpit

	2020	2021	2022	2023	2024	2025	2026	CAGR (20-26)
In-Vehicle Infotainment	89.3%	91.1%	93.1%	95.0%	96.0%	97.0%	98.6%	1.7%
Annual Growth Rate		2.0%	2.2%	2.1%	1.0%	1.0%	1.7%	
Cockpit Display System	26.9%	34.7%	42.6%	49.5%	54.5%	59.4%	65.8%	16.0%
Annual Growth Rate		28.7%	22.9%	16.3%	10.0%	9.1%	10.7%	
HUD	8.6%	10.6%	13.6%	17.5%	23.5%	29.7%	34.1%	25.8%
Annual Growth Rate		23.0%	28.0%	29.2%	33.9%	26.6%	14.9%	
Streaming rearview mirror	7.5%	9.9%	13.9%	17.8%	21.8%	25.7%	29.5%	25.6%
Annual Growth Rate		31.6%	40.0%	28.6%	22.2%	18.2%	14.8%	
Dashcam	12.9%	16.8%	22.8%	28.7%	35.6%	43.6%	49.7%	25.3%
Annual Growth Rate		30.8%	35.3%	26.1%	24.1%	22.2%	14.2%	
Rear LCD display	1.1%	2.0%	3.0%	4.0%	5.4%	6.9%	8.1%	39.7%
Annual Growth Rate		81.8%	50.0%	33.3%	37.5%	27.3%	16.7%	

With the development of technology related to the smart cockpit, the market price of each component of the smart cockpit has been reduced.

Chart 2 Global Smart Cockpit Price (in U.S. dollars)

	2020	2021	2022	2023	2024	2025	2026	CAGR (20-26)
In-Vehicle Infotainment	297.14	287.58	290.50	287.77	284.95	282.15	281.21	-0.9%
Annual Growth Rate		-3.22%	1.02%	-0.94%	-0.98%	-0.98%	-0.33%	
Cockpit Display System	414.54	374.28	352.00	348.76	345.37	342.02	330.31	-3.7%
Annual Growth Rate		-9.71%	-5.95%	-0.92%	-0.97%	-0.97%	-3.42%	
HUD	221.50	206.47	200.23	198.59	196.50	194.61	190.34	-2.5%
Annual Growth Rate		-6.78%	-3.03%	-0.81%	-1.06%	-0.96%	-2.20%	
Streaming rearview mirror	121.94	113.85	110.30	109.30	108.17	107.15	104.77	-2.5%
Annual Growth Rate		-6.63%	1.02%	-0.94%	-0.98%	-0.98%	-0.33%	
Dashcam	43.00	41.46	41.93	41.48	41.17	40.59	40.92	-0.8%
Annual Growth Rate		-3.58%	1.13%	-1.06%	-0.76%	-1.41%	0.81%	
Rear LCD display	173.85	162.65	156.38	156.65	154.45	152.21	148.84	-2.6%
Annual Growth Rate		-6.44%	-3.85%	0.17%	-1.40%	-1.45%	-2.21%	

In the case of high-level autonomous driving progress is lower than expected, more and more car companies and Internet technology companies will focus on the more easily landed intelligent cockpit. According to the price and market penetration rate of the main components can be measured, in 2020, the global

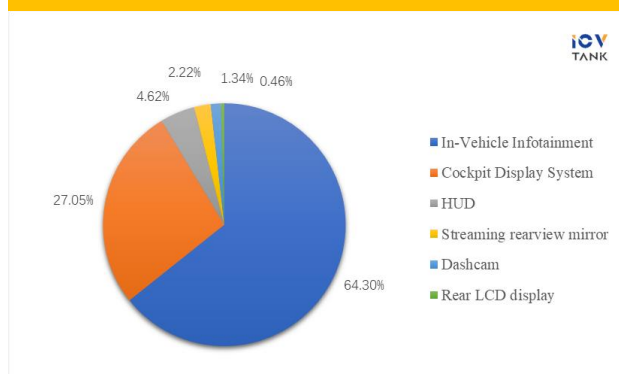
market size of intelligent cockpit is 23.1 billion U.S. dollars, China's intelligent cockpit market size is 8.3%; 2026, the global intelligent cockpit market can reach 44 billion U.S. dollars, a compound annual growth rate of 11.3%, China's intelligent cockpit market can reach 18.3 billion U.S. dollars, a compound annual growth rate of 14.2%.

Chart 3 Intelligent Cockpit Market Size (in billion U.S. dollars)

	2020	2021	2022	2023	2024	2025	2026	CAGR (20-26)
Global passenger vehicle volume	5583.5	6756.3	6814.6	6873.0	6931.3	6989.6	7048.0	4.0%
Number of passenger vehicles in China	1999.4	2482.1	2573.7	2665.2	2756.8	2848.3	2939.8	6.6%
In-Vehicle Infotainment	14.8	17.7	18.5	18.8	19.0	19.2	19.6	4.7%
Annual Growth Rate	19.45%	4.10%	2.03%	0.90%	0.88%	2.17%		
Cockpit Display System	6.2	8.8	10.2	11.9	13.1	14.2	15.3	16.2%
Annual Growth Rate	40.58%	16.54%	16.19%	9.86%	8.94%	7.82%		
HUD	1.1	1.5	1.9	2.4	3.2	4.0	4.6	27.5%
Annual Growth Rate	38.73%	25.24%	29.24%	33.61%	26.42%	13.36%		
Streaming rearview mirror	0.5	0.8	1.0	1.3	1.6	1.9	2.2	27.3%
Annual Growth Rate	48.66%	36.80%	28.50%	21.98%	18.06%	13.14%		
Dashcam	0.3	0.5	0.7	0.8	1.0	1.2	1.4	29.2%
Annual Growth Rate	52.57%	38.00%	25.82%	24.24%	21.52%	16.05%		
Rear LCD display	0.1	0.2	0.3	0.4	0.6	0.7	0.8	41.5%
Annual Growth Rate	105.83%	45.46%	34.71%	36.72%	26.48%	15.03%		
Global Market Size	23.1	29.4	32.5	35.7	38.5	41.3	44.0	11.3%
Annual Growth Rate	27.5%	10.6%	9.7%	7.8%	7.4%	6.4%		
China Market Size	8.3	10.8	12.3	13.8	15.3	16.8	18.3	14.2%
Annual Growth Rate	30.9%	13.7%	12.6%	10.6%	10.0%	8.9%		

The In-Vehicle Infotainment is the largest market in the intelligent cockpit, accounting for about 64.3% of the market. This is followed by the Cockpit Display System and head-up display system, accounting for 27.05% and 4.62% respectively.

Figure 1 Market Size Share of Smart Cockpit by Segments in 2020 (%)



With the continuous development of cockpit hardware and software technology, intelligent cockpit design is also evolving, from a functional demand-oriented, to the "user experience" as the core of the direction of evolution, intelligent cockpit more and more safe, intelligent, comfortable.



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