

Automotive Software Market in Japan: Key Research Findings 2017

◆ Research Outline

Yano Research Institute has conducted a research on the domestic automotive software market with the following conditions:

1. Research period: January to May, 2017
2. Research target: Domestic and overseas automakers (OEM), manufacturers of car-electronics devices, in-vehicle software (OEM-related, car-electronics maker-related, or independent), development tool vendors, consultants, etc.
3. Research methodologies: Face-to-face interviews by the expert researchers, surveys via telephone/email, and literature search

<What is Automotive Software? >

Automotive software in this research indicates those software embedded within automotive ECUs (electronic control units) of car electronics devices and development tools for such ECUs, to control one or more of the electrical system or subsystems in a transport vehicle.

<What is AUTOSAR related Market? >

AUTOSAR (Automotive open system architecture) related market is the market regarding those software conforming to AUTOSAR specified to standardize automotive software.

◆ Key Findings

■ Domestic OEM and Other Manufacturers Pressing Ahead With Standardization of Automotive Software, Aiming to Reduce Development Costs

It is sure that automotive software per vehicle would increase in capacity (the number of codes to be bloated) toward the future self-driving era. Therefore, OEMs have started striving for reducing development costs. The domestic OEMs and makers of car electronics and embedded software are trying to reduce development costs by utilizing AUTOSAR, the platform where automotive software is to be standardized, and by effectively sharing and using the past software assets.

■ Domestic Automotive Software Market in 2016 Attained 525 Billion Yen, 138.3% on Y-o-Y Basis

The domestic automotive software market in 2016 based on the sales of the businesses has attained 525.0 billion yen, 138.3% of the size of the previous year. Due to the expanding capacity of automotive software, the market size is projected to achieve 747.5 billion yen by 2020, and 995.0 billion yen by 2030.

■ 2016 Domestic AUTOSAR Related Market Achieved 11.5 Billion Yen, 185.5% on Y-o-Y Basis

Out of the domestic automotive software market, the AUTOSAR (Automotive open system architecture) related market based on the sales of the businesses has attained 11.5 billion yen, 185.5% of the size of the preceding year. In an attempt to reduce development costs, use of AUTOSAR is likely to be propelled in Japan as well for the future. This makes the AUTOSAR related market to be projected to attain 205 billion yen by 2030, expanding to occupy 20.6% of the entire automotive software market.

◆ **Report Format:**

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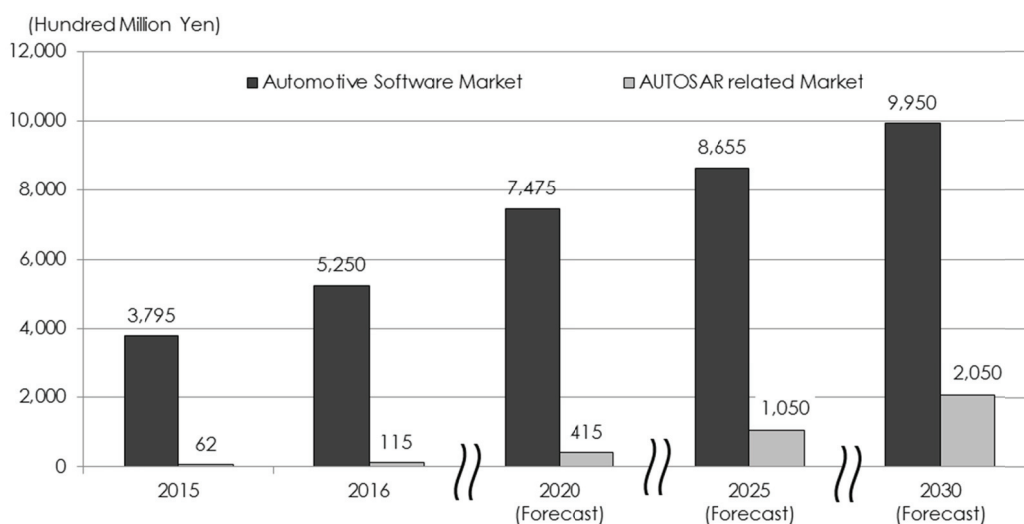
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■ **Figure & Table 1: Transition and Forecast of Automotive Software/AUTOSAR Related Market Size**



(Unit: Hundred Million Yen, %)

	2015	2016	2020 (Forecast)	2025 (Forecast)	2030 (Forecast)
Automotive Software Market	3,795	5,250	7,475	8,655	9,950
AUTOSAR related Market	62	115	415	1,050	2,050
Composition Ratio (%)	1.6%	2.2%	5.6%	12.1%	20.6%

Estimated by Yano Research Institute

Note:

1. The market size is based on the sale of businesses.
2. Automotive software in this research indicates those software embedded within automotive ECUs (electronic control units) of car electronics devices and development tools for such ECUs, to control one or more of the electrical system or subsystems in a transport vehicle.
3. The AUTOSAR related market is a part of the automotive software market.