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201 – Innovation Guide

In recognizing this, OEMs and suppliers are quickly ramping up their R&D but face a tough task in prioritizing areas of investment.

Our Innovation Guide has been created to help companies understand innovations inside, or on the peripherals of the automotive industry, and the companies spearheading those technologies.

#202



Disruption
Radar

Start-up Tracker

The past few years have seen a surge in the number of start-ups providing an array of services for the automotive industry. Likewise, their offerings extend across the industry landscape - with products spanning infotainment, telematics, safety, security, and autonomous driving functions. Their offering within these areas is similarly diverse, with some autonomous start-ups developing specific sensors and others developing full sensor suites.

In a similar fashion to mainstream OEMs, the start-up landscape is consistently evolving at a fast pace. A wide variety of start-ups today are regularly announcing new technologies or systems while securing partnerships, investments, or even acquisitions from legacy OEMs looking to boost their offering as well as newer players looking to gain footing. As start-ups continue to innovate, industry interest in them and their offerings will continue to grow.

The Start-up Tracker works to highlight the latest updates from the expansive landscape of start-ups operating in the automotive industry. It tracks their latest activity while providing the latest news on interesting start-ups emerging within the space. The tracker also sheds light on its most recent partnerships and acquisitions. Updated monthly, this report details the top automotive events that feature, or are centered around, them.

COVERAGE



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NA



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Monthly



QUARTERLY



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Key questions answered

- > What are the latest industry news announcements related to automotive start-ups?
- > What services can start-ups provide for the automotive industry?
- > What industry partnerships exist between automotive start-ups and other companies?
- > What are the most important events centered around innovation & start-ups?

This research supports



PRODUCT PLANNERS



TECH SCOUTING
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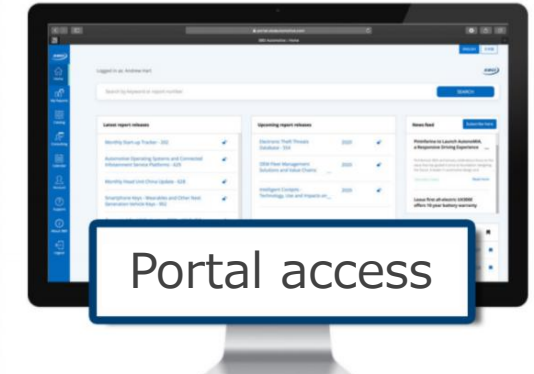
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Monthly Report for 2025

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START-UP TRACKER

202- Start-up Tracker

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Introduction

Headline for the Introduction from elevator pitch or outcomes


Staying updated to date on investment and partnership opportunities is crucial for business success; that helps to find valuable prospects and stay ahead of the competition.

Having an in-depth study of recent trends, strategies, and advancements, helps with the insights necessary to make informed strategic decisions regarding market opportunities and innovation within their organizations. Exploring partnerships, acquisitions, and staying informed with the latest news, offers a broader understanding of the market trends.

What are the key findings of this report?

- What are the OEM common choices? To make acquisitions or partnerships?
- What are start-ups more focused on? EV-related technologies, mobility, or autonomy?



Layer	Section	Conclusion
STRATEGY & IMPACT	Executive Summary	Top mergers, acquisitions, partnerships and investments from Q1 2025.
	The Basics	Definition of all the start-up features covered throughout this report with their maturity stages.
LEARNING & ACTION	What's New?	The latest updates from the automobile industry related to start-ups, collaborations and investments.
	Categories and Analysis	Major or key innovative start-ups with companies' sector and Regional distribution and SBD insights on their business and products.
CORE INSIGHTS	DATA DEEP DIVE IN EXCEL	<div> <div> News Company Information Collaboration Tracker Startup Investments Venture Capital and Incubators </div> <div>  View and analyze deep data in your own way </div> </div>
CONTEXT	Birds Eye View	An overview of the tangential trends to this topic, as identified in SBD's neighboring products
	Next Steps	Can SBD help you with any unanswered questions?

Example slides from the report



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Startups, incubators, acquisitions and mergers. What are they?

Start-Ups

An entrepreneurial group, known as a startup, is a fledgling business that was established with the goal of creating and launching an innovative service or product.

Innovation

Startups may want to completely reinvent products and services, or upend established markets

Scalability

Startups have the potential to expand quickly and grow their customer base

Funding

Angel investors and venture capitalists are two types of investors that startups frequently depend on for outside investment

Incubators

Incubators are establishments created to accelerate the expansion of startups by offering them diverse resources and business connections

Quicker Expansion

Incubator may provide access to networks, resources, and mentorship, which can accelerate development

Possibilities of achievement

With the help of Incubators there are potentially more chances of success and survival

Acquisitions and Mergers

When two businesses unite to create a new legal entity, this is known as a merger

Buying all or a portion of the shares or assets of another business is known as an acquisition

Investments and Partnerships

A key player in the ownership, management, and/or creation of a business is referred to as a business partner

A person or entity that lends money to a firm in the hope of earning a profit later on is known as an investor



Startup industry in 2025 with a strong focus on Electrification and AI

Key Areas Where Performance Can Be Optimized



High Capital Requirements: Attracting Investment and Managing Costs



Long Development Cycles: Streamlining Development for Faster Iteration



Stringent Safety Regulations: Navigating Regulatory Hurdles



Established Competition: Building a Competitive Advantage



Partnerships are Crucial: Leveraging Partnerships for Growth

Startups are at the forefront of innovation, revolutionizing diverse sectors, such as AI, EV technology, autonomous driving, cybersecurity, and groundbreaking business models. Their transformative ideas are shaping the future and driving progress like never before.

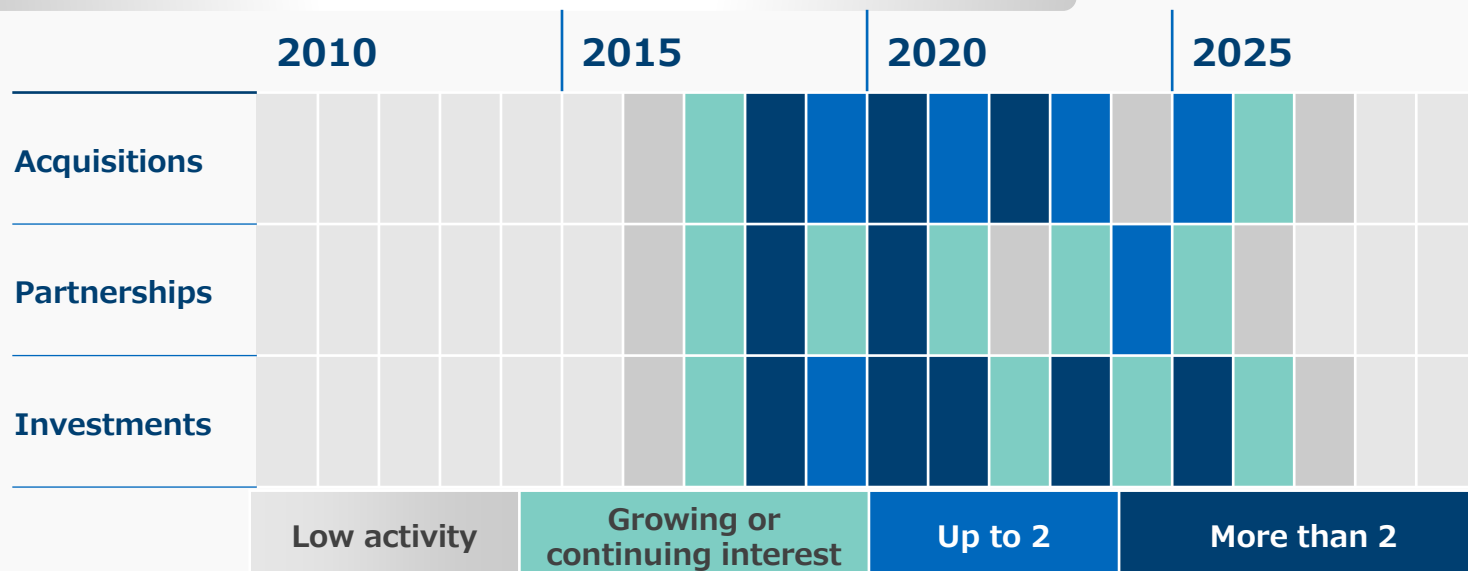


Leading OEM and Supplier working with Start-ups in AI and Electrification



AI model training startups - partnerships and acquisitions

Summary



Acquisitions

Category of company (top 3)	Number of startups
Tier 1 Suppliers	3
Web based application software developer	3
Non-automotive handheld and light consumer electronics	2

Partnerships

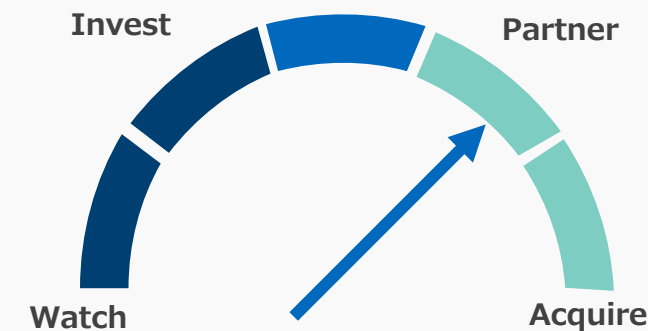
Category of company (top 3)	Number of startups
OEM	4
In-car commerce provider	1
Semiconductor design and manufacture	1

Insights

11 acquisitions have been logged in SBD's startup database, of those 11, 9 produced software. 3 of those 9 acquisitions were by Tier 1 suppliers whereas 0 OEM acquisitions have been logged. The 3 Tier 1 suppliers are Infineon, Microsoft and Intel.

BMW, GM and Honda Venture funds have all made investments in AI companies.

Depending on your strategy, you may wish to:

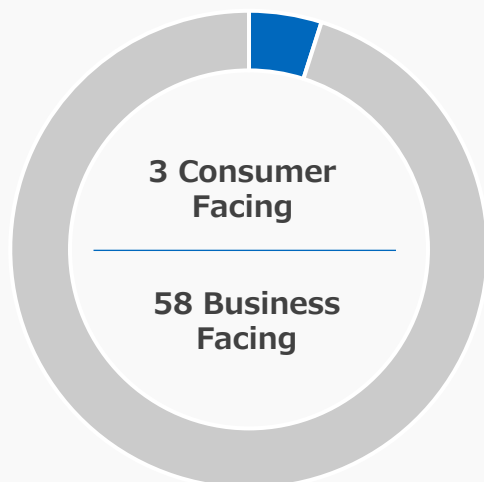




Cybersecurity and privacy – Summary of SBD's database

Overview

Companies classified in the 'Cybersecurity and Privacy' offer consultancy and professional services to help companies develop secure example, produce software the helps protect systems. They work at an enterprise and vehicle level and across a range of industries. For example, some companies in the section produce secure payment software and some offer on-vehicle security consultancy.

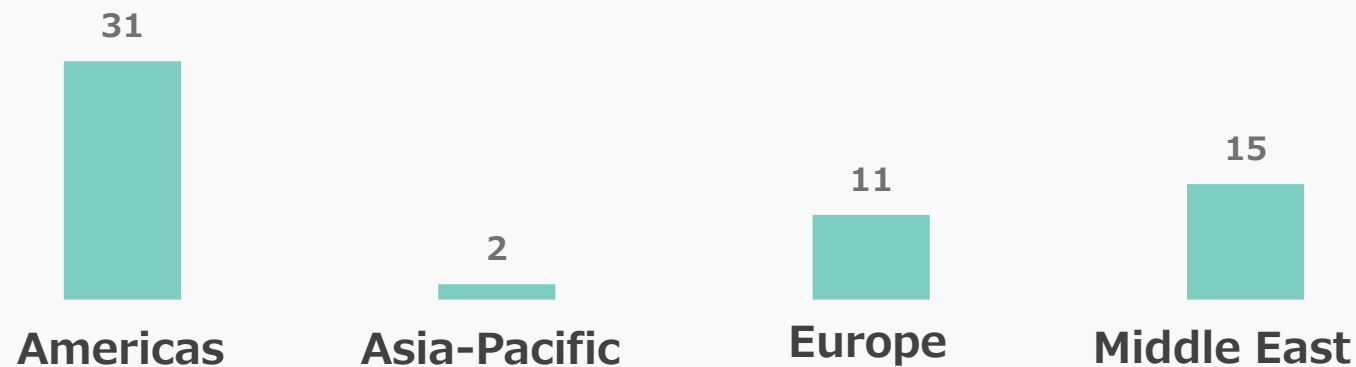


Company and Sector Distributions

Top 3 sub-industries			
No. of active companies (not including acquisitions)	43	IT Consulting & Other Services	40 of 59
No. of acquisitions	15	Application Software	7 of 59
No. of closures	1	Internet Services and Infrastructure	6 of 59

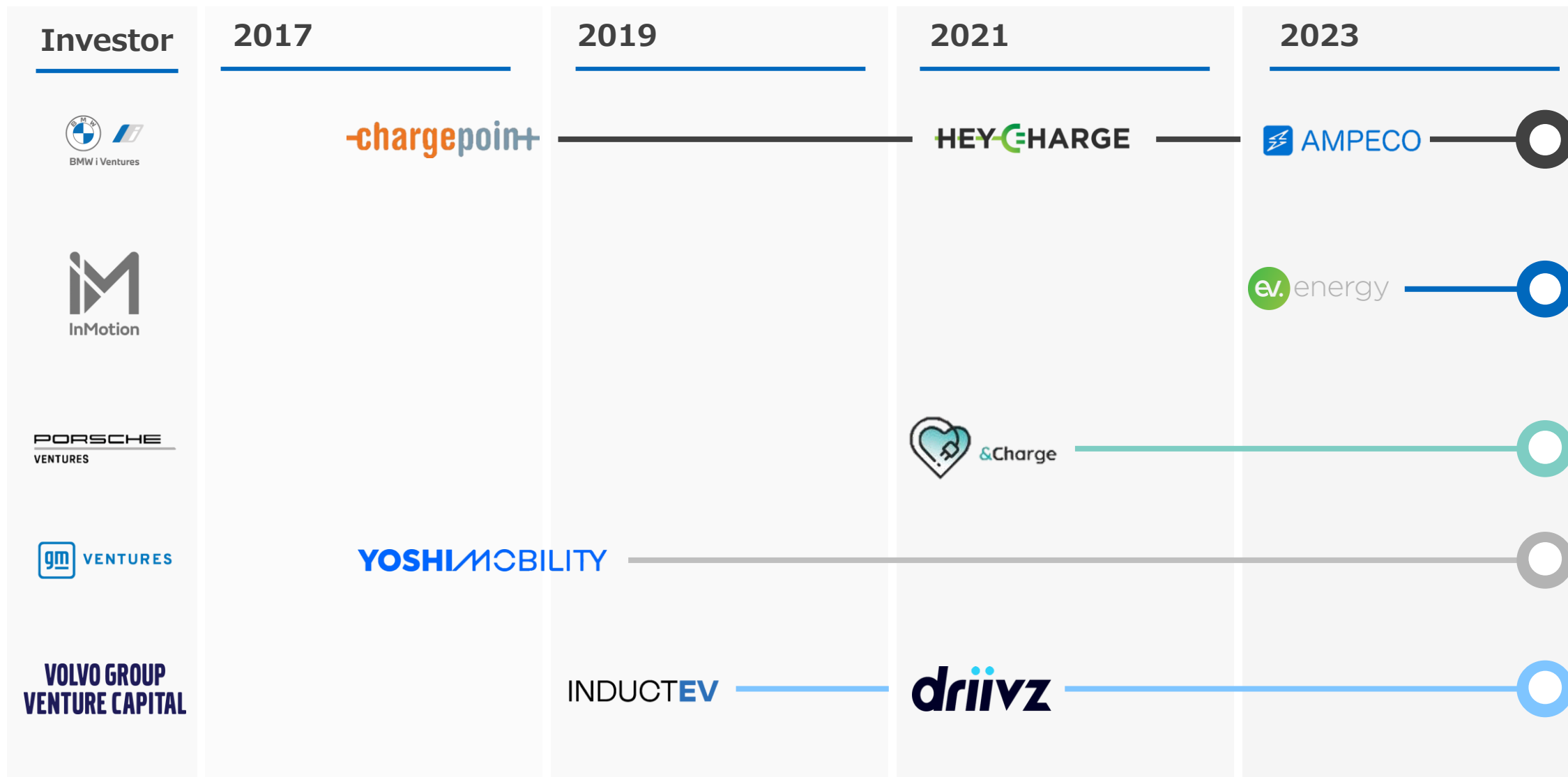
Regional Distributions

■ Number of startups founded in region





BMW and Volvo venture funds making multiple investments





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Do you have any questions?

If you have any questions or feedback about this research report or SBD Automotive's consulting services, you can email us at info@sbdautomotive.com or discuss with your local account manager below.



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