CES2026 AUTO VERTICAL PREVIEW

THE KEY ADVANCES DRIVING AUTOMATIVE FORWARD

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OMNICOM AT CES 2026
AUTO VERTICAL PREVIEW

OVERVIEW

Concepts? Check. From EVs to autonomy, we've gotten a glimpse of the future. Now reality kicks in. For automakers at CES 2026, commercialization is the name of the game. This year's show focuses on what's actually shipping—L3 autonomous systems are reaching consumers, charging infrastructure scaling, and AI moving from the cloud into the cabin.

Consumer expectations are shifting in parallel. Drivers increasingly view their vehicles as software platforms, expecting the same update cadence and personalization they get from smartphones. EV buyers have moved past range anxiety to charging anxiety—they want seamless, predictable experiences at every plug. And as AI assistants become standard, consumers are forming relationships with in-vehicle personalities that may rival their connection to the brand itself.

735 automotive-relevant exhibitors identified

71% returning from CES 2025

29% new entrants

90 startups in Eureka Park with automotive focus

KEY TAKEAWAYS

1. The AI copilot is coming to the dashboard

Voice assistants are evolving into genuine in-vehicle AI agents. Companies like SoundHound AI process billions of interactions, and OEMs are integrating LLMs for contextual, personalized experiences. Consumers are beginning to expect their car to know them—their preferences, their routines, their voice—the way their phone does.

2. Software is eating the car

Every major OEM is reorganizing around software-defined vehicle architectures. The car you sell is now the starting point—OTA updates, feature subscriptions, and continuous improvement define the customer relationship. Consumers now expect their three-year-old vehicle to gain new capabilities, not lose relevance.

3. Charging experience is the new battleground

Range anxiety is yesterday's problem. Today's challenge: making the charging experience seamless. Consumers rank charging reliability and speed as top purchase considerations—and a single bad public charging experience can damage brand perception for years.

4. L3 autonomy finally arrives

After years of "five years away," Level 3 is actually shipping. Mercedes, BMW, and others have regulatory approval. Consumers are cautiously curious: they want the convenience but need reassurance about safety, liability, and what happens when the system hands control back.

TREND 1: IN-VEHICLE AI & AGENTS

AI IS RIDING SHOTGUN

Strategic Context

Generative AI is transforming the in-cabin experience from static infotainment to adaptive, conversational interfaces. For automotive brands, this creates both opportunity and risk: the AI assistant becomes a primary touchpoint for brand experience, but also a potential hiccup if voice platforms control the interaction.

CONSUMER BEHAVIOR SHIFT:

Drivers are rapidly normalizing conversational interaction with their vehicles. Early adopters already prefer voice commands over touchscreens for navigation, climate, and media—and they're starting to expect the AI to anticipate needs rather than wait for commands. The bar is being set by smartphone assistants: consumers expect their car's AI to remember context across sessions, understand natural speech (including interruptions and corrections), and never make them repeat themselves. Brands that deliver clunky voice experiences risk being perceived as behind technologically, regardless of vehicle quality.

WHAT THIS MEANS FOR AUTOMOTIVE BRANDS:

Consider how your brand voice translates to an AI persona—literally.

Evaluate whether to build proprietary AI capabilities or partner with platform providers.

Key questions to ask vendors: "How does your AI handle brand-specific knowledge?" and "Who owns the customer data from voice interactions?"

TREND 1: KEY SUB-TRENDS

1. Voice AI & Conversational Interfaces

Natural language is becoming the primary input method for vehicle controls, navigation, and infotainment.

COMPANY	ABOUT	LOCATION
SoundHound AI	Voice AI leader processing billions of interactions yearly. Platform powers in-vehicle assistants for major OEMs.	Hall NN, Booth 5867
AI Speech	China's leading conversational AI platform with LLM capabilities for smart cockpit integration.	Hall NN, Booth 5367
aiOla*	Voice-agentic workflows transforming frontline speech into structured, validated data. Seeking $2-15M, Series A.	Hall M, Booth 61313

2. Driver & Occupant Monitoring

Camera and sensor-based systems that understand who's in the vehicle and their state.

COMPANY	ABOUT	LOCATION
emotion3D	Camera-based DMS/OMS specialist analyzing humans and objects in cabin environments. Goes beyond regulatory requirements.	Hall NN, Booth 7258
Carlinx Tech*	Smart cockpit + AI agent services deployed with Geely, Dongfeng, BAIC, and Chery. Seeking $2-15M, Series B.	Hall NN, Booth 6867

3. Edge AI & Personalization

On-device AI enabling real-time personalization without cloud latency.

COMPANY	ABOUT	LOCATION
Hailo	Cost/power-efficient AI processors for edge automotive applications.	Hall J, Suite 29-308
DeepMentor*	Miniaturized AI IP including LLM models (7B-180B) for in-vehicle deployment. Seeking $250K-2M, Pre-seed.	Hall M, Booth 62201
Sakak (CANDiY AI)	Hyper-personalized AI agents for automotive, smartphone, and medical devices.	Hall M, Booth 63600

* Companies marked with an asterisk are actively seeking funding. See the Appendix for financial details.

TREND 2: SOFTWARE-DEFINED VEHICLES

THE CAR YOU BUY IS JUST THE BEGINNING—SOFTWARE MAKES IT BETTER OVER TIME

Strategic Context

The software-defined vehicle represents the most significant architectural shift in automotive since the moving assembly line. OEMs are moving from hardware-first to software-first design, enabling continuous improvement, feature-on-demand subscriptions, and fundamentally new customer relationships.

CONSUMER BEHAVIOR SHIFT:

Vehicle owners are developing new mental models for car ownership. Tesla normalized the idea that your car improves after purchase; now consumers across brands expect it. This creates both opportunity and peril. On the upside, owners who receive meaningful OTA updates report higher satisfaction and stronger brand loyalty. On the downside, consumers are increasingly skeptical of "subscription fatigue"—they'll pay for genuine new capabilities but resent being charged for features they believe should be standard. The winners will be brands that make software updates feel like gifts rather than upsells, and that communicate clearly what's included versus what costs extra.

WHAT THIS MEANS FOR AUTOMOTIVE BRANDS:

The vehicle purchase is now the start of an ongoing relationship, not the end of the sales funnel.

Consider how marketing strategies shift when features can be unlocked post-purchase.

Key questions to ask OEMs: "What's your OTA update cadence?" and "How do you measure customer lifetime value in a software defined vehicle (SDV) world?"

TREND 2: KEY SUB-TRENDS

1. Domain Controllers & Centralized Compute

Consolidating vehicle electronics from 100+ ECUs to centralized computing platforms.

COMPANY	ABOUT	LOCATION
Visteon	Global leader accelerating software-defined transformation. Pioneering digital cockpit electronics and EV systems.	Hall RR, Booth W301-304
AutoLink	World's first fully automated smart cockpit domain controller production line. 800,000+ units in 2024.	Hall NN, Booth 4755
HL Mando	Global SDV and autonomous driving solutions company specializing in chassis, sensors, and software.	Hall NN, Booth 3854

2. Embedded OS & Middleware

The software foundations enabling SDV architectures.

COMPANY	ABOUT	LOCATION
BlackBerry QNX	Embedded OS trusted in 255+ million vehicles globally. Safety-critical foundation for SDV.	Hall NN, Booth 4024
Real-Time Innovations (RTI)	Safety-certified communication framework for SDVs. Bridges legacy to modern architectures.	Hall NN, Booth 4662
Apex.AI	SDK helping OEMs and suppliers transition from hardware-centric to software-defined systems.	Hall NN, Booth 3231

3. Vehicle Data Platforms

Turning vehicle data into actionable insights and services.

COMPANY	ABOUT	LOCATION
Sonatus	AI-driven software-defined vehicle platform. Enables automakers to harness vehicle data for performance optimization.	Hall NN, Booth 5439
Fujitsu	AI agents, SDV, Data, and Social Digital Twins for next-generation mobility. New to CES 2026.	Hall NN, Booth 4099

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TREND 3: EV & CHARGING INFRASTRUCTURE

RANGE ANXIETY WAS THE OLD PROBLEM— CHARGING EXPERIENCE IS THE NEW ONE

Strategic Context

Electric vehicle adoption has hit mainstream inflection, but infrastructure remains the bottleneck. The narrative has evolved: it's no longer about convincing consumers EVs work—it's about making the charging experience as seamless as filling a gas tank. Battery innovation (solid-state, lifecycle management) and charging infrastructure (megawatt, wireless) are where the action is.

CONSUMER BEHAVIOR SHIFT:

EV buyers have graduated from early-adopter enthusiasm to mainstream pragmatism. They've done the math on home charging and are comfortable with daily driving, but public charging remains a pain point that disproportionately shapes brand perception. A single failed charge session (broken charger, incompatible plug, confusing payment) can undo months of positive ownership experience. Consumers are also increasingly aware of battery degradation and resale value concerns; they want transparency about battery health and are attracted to brands that offer clear lifecycle guarantees. Sustainability messaging resonates, but only when backed by tangible proof points like recycling programs, ethical sourcing, and real carbon footprint data.

WHAT THIS MEANS FOR AUTOMOTIVE BRANDS:

Charging is a brand experience touchpoint—consider partnerships with charging networks.

Battery lifecycle and sustainability messaging matter to environmentally-conscious buyers—addressing concerns among this core group of early adoptees is crucial to reaching critical mass.

Key questions to ask: "What's the real-world charging time?" and "How does the vehicle integrate with home energy systems?"

TREND 3: KEY SUB-TRENDS

1. Next-Gen Charging Infrastructure

Faster, smarter, more accessible charging solutions.

COMPANY	ABOUT	LOCATION
Autel Energy	Global leader in EV charging solutions with comprehensive cloud management and reporting.	Hall NN, Booth 6219
TMEVnet	Megawatt charging cable cooling using liquid evaporation phase-change technology. New to CES 2026.	Hall M, Booth 62901
WiPowerOne*	Wireless charging for EVs and robotaxis. Enables fully autonomous charging. Seeking $250K-2M, Series A.	Hall X, Booth 50523
EcoG	Fast charging infrastructure leader with 15% market share in charge controllers.	Hall X, Booth 51242

2. Battery Innovation

Chemistry, form factors, and management systems advancing energy density and safety.

COMPANY	ABOUT	LOCATION
XING Mobility	Global leader in immersion-cooled battery technology. Enhances safety, thermal management, and performance.	Hall NN, Booth 7059
LeydenJar*	World record silicon anodes at 1350 Wh/L energy density. Breakthrough for range and charging speed. Seeking $2-15M, Series B.	Hall M, Booth 62100
ASET*	Solid-state electrolyte membranes with superior fire safety. Compatible with existing Li-ion lines. Seeking $2-15M, Series A. New to CES 2026.	Hall M, Booth 62949

3. Battery Lifecycle & Sustainability

From manufacturing to recycling—the full battery journey.

COMPANY	ABOUT	LOCATION
Batterfly*	AI-powered EV battery lifecycle management. Covers monitoring, evaluation, certification, and recycling. Seeking $250K-2M, Seed. New to CES 2026.	Hall M, Booth 61700
Togi Teknoloji*	Advanced BMS with battery passport platform. Cloud-based diagnostics and early compliance readiness. Seeking <$250K, Pre-seed. New to CES 2026.	Hall X, Booth 50759

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TREND 4: ADAS & AUTONOMY EVOLUTION

AUTONOMY ISN'T "FIVE YEARS AWAY"— IT'S SHIPPING NOW

Strategic Context

After a decade of autonomous vehicle hype, 2025-2026 marks a genuine inflection point. Level 3 systems are receiving regulatory approval and reaching consumers—Mercedes Drive Pilot in Germany, BMW Personal Pilot in select markets. The conversation is shifting from "when will autonomy arrive?" to "what's actually on the road today?"

CONSUMER BEHAVIOR SHIFT:

Consumer attitudes toward autonomy are nuanced and evolving. There's genuine interest in hands-free highway driving, especially for commuters and road-trippers, but deep ambivalence about full autonomy. Consumers want to understand exactly what the car can and cannot do, and they're uncomfortable with ambiguity. The handoff moment—when the system asks the driver to take over—is particularly fraught; consumers report anxiety about whether they'll be ready and who's liable if something goes wrong. Trust is earned incrementally: positive experiences with adaptive cruise control and lane-keeping build confidence for higher levels of autonomy. Brands that over-promise and under-deliver (or worse, have publicized incidents) face lasting skepticism that extends beyond the specific model involved.

WHAT THIS MEANS FOR AUTOMOTIVE BRANDS:

L3 changes the driver-to-passenger transition—marketing should address trust and handoff.

Sensor technology (4D radar, solid-state LiDAR) is differentiating, not commoditizing.

Key questions to ask: "What L2+/L3 features are available at launch vs. OTA update?" and "How does the vehicle communicate its autonomous capability to the driver?"

TREND 4: KEY SUB-TRENDS

1. 4D Radar & Sensor Fusion

Next-generation perception systems enabling all-weather autonomy.

COMPANY	ABOUT	LOCATION
DeepFusion AI*	Perceptive Sensor Fusion AI using 4D imaging radar for 360° perception. CES 2026 Best of Innovation Award. Seeking $250K-2M, Series A.	Hall M, Booth 63416
Arbe	Ultra-HD Radar (2,304 channels) delivering 300m+ mapping. Weather-immune perception enabling L3 highway driving.	Hall NN, Booth 4551
Aeva	4D LiDAR with simultaneous velocity and position detection. Bridging perception for automated driving and robotics.	Hall NN, Booth 6919

2. LiDAR Innovation

Solid-state, automotive-grade sensors reaching production scale.

COMPANY	ABOUT	LOCATION
HESAI	Global lidar leader (Nasdaq: HSAI). Products span passenger vehicles, commercial fleets, and robotics.	Hall NN, Booth 5601
Innoviz Technologies	Automotive-grade LiDAR and perception software. Works with premium car brands toward autonomous future.	Hall NN, Booth 7318

3. Simulation & Validation

Tools enabling safe development and deployment of autonomous systems.

COMPANY	ABOUT	LOCATION
dSPACE	Leading simulation and validation solutions for connected, autonomous, and electric vehicles.	Hall NN, Booth 4500
Parallel Domain*	High-fidelity digital twins bridging simulation and reality. Sensor simulation for faster, safer AV testing. Seeking $15-50M, Series B.	Hall NN, Booth 6673
Foretellix	Data-automation toolchain for AV training, validation, and safety evaluation. Enables measurable efficiency at scale.	Hall NN, Booth 4767

TREND 4: KEY SUB-TRENDS

4. Industry Leaders

The established players shaping autonomous deployment.

COMPANY	ABOUT	LOCATION
Mobileye	Industry leader in autonomous driving and ADAS. Computer vision, machine learning, and mapping at scale.	Hall EE, Booth W213-215
Waymo	World's most experienced autonomous driver. Waymo Driver technology with billions of real-world miles.	Hall NN, Booth 4600

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APPENDIX: EXHIBITORS CURRENTLY RAISING FUNDING

Featured in This Report

COMPANY	TREND	STAGE	AMOUNT	REVENUE	NOTABLE
DeepFusion AI	ADAS	Series A	$250K-2M	>$1M	CES Best of Innovation
Parallel Domain	ADAS	Series B	$15-50M	>$1M	Digital twins for AV testing
LeydenJar	EV	Series B	$2-15M	>$1M	World record energy density
Batterfly	EV	Seed	$250K-2M	$500K-1M	AI battery lifecycle
WiPowerOne	EV	Series A	$250K-2M	<$500K	Wireless EV charging
ASET	EV	Series A	$2-15M	<$500K	Solid-state electrolytes
Togi Teknoloji	EV	Pre-seed	<$250K	>$1M	BMS + battery passport
aiOla	In-Vehicle AI	Series A	$2-15M	>$1M	Voice-agentic workflows
Carlinx Tech	In-Vehicle AI	Series B	$2-15M	>$1M	Deployed with major OEMs
DeepMentor	In-Vehicle AI	Pre-seed	$250K-2M	$500K-1M	Edge LLM for vehicles

Additional Notable Auto Exhibitors Seeking Funding

COMPANY	FOCUS	STAGE	AMOUNT	REVENUE	LOCATION
Electra Vehicles	AI-driven battery intelligence for e-mobility and energy	Series B	$15-50M	>$1M	Hall NN, Booth 7324
Helm.ai	AI software for ADAS, autonomous driving, and robotics	Series C+	>$50M	>$1M	Wynn Encore Suites
Imagry	Generative autonomy without HD maps or LiDAR	Series B	$15-50M	>$1M	Hall NN, Booth 6467
Deepen AI	Data lifecycle tools for autonomous systems	Seed	$15-50M	>$1M	Hall NN, Booth 3161
Zeta Mobility	AI-powered 4D radar for adverse weather conditions	Series A	$250K-2M	<$500K	Hall M, Booth 62817
whereable.ai	Autonomous driving for special-purpose mobility	Series A	$2-15M	$500K-1M	Hall M, Booth 61453
Compredict	Vehicle intelligence making cars more sustainable	Series C+	$2-15M	>$1M	Hall X, Booth 51242
GLEC Inc	AI tachographs and fleet intelligence for trucks	Seed	$250K-2M	<$500K	Hall M, Booth 63600
TimeTick	AI diagnostics for EV charging infrastructure	Pre-seed	<$250K	>$1M	Hall B, Booth 14717a
Adro Inc	AI-based aerodynamics optimization for vehicles	Series B	$2-15M	$500K-1M	Hall NN, Booth 4675

APPENDIX: YOY HIGHLIGHTS

New to CES 2026 (from curated list)

- TMEVnet (EV charging cooling)
- Batterfly (battery lifecycle)
- WiPowerOne (wireless charging)
- ASET (solid-state electrolytes)
- Togi Teknoloji (BMS + battery passport)
- ETAS (vehicle software)
- Fujitsu (SDV + digital twins)

Limitations

EV & Charging: Highest new entrant activity—5 of 7 new curated companies

ADAS & Autonomy: Most established—all curated companies returning from 2025

SDV: Enterprise-driven—new entrants are major players (ETAS, Fujitsu), not startups

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Report prepared by Omnicom Technology Practice Data extracted from CES 2026 exhibitor database, December 2025