

# Europe Heavy-Duty Autonomous Vehicle Market: Focus on Application, Propulsion, Vehicle Type, Level of Autonomy, Sensor Type, and Country - Analysis and Forecast, 2024 - 2033

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## Abstracts

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This report will be delivered in 7-10 working days. Introduction to Europe Heavy-Duty Autonomous Vehicle Market

The Europe heavy-duty autonomous vehicle market was estimated \$44.64 billion in 2024 and is projected to reach \$555.43 billion by 2033, with a CAGR of 32.33% during the forecast period 2024-2033. AI, machine learning, and advanced automation are driving the heavy-duty autonomous vehicle sector in Europe, allowing trucks, buses, and off-road equipment to function with little assistance from humans. These vehicles, which are outfitted with sensors, IoT connectivity, and predictive analytics, increase safety, reduce operating expenses, and improve productivity in the fields of agricultural, public transportation, logistics, and construction. Growth is fuelled by the need for automation, EU sustainability regulations, and continuous technical advancement. The models are divided between semi-autonomous (SAE Levels 1-2) and fully autonomous (Levels 3–5).

### Market Introduction

The market for heavy-duty autonomous vehicles in Europe is expanding rapidly as a result of the convergence of sophisticated AI, machine learning, and strong sensor suites, which allow for dependable Level 2+ through Level 4 autonomy in trucks, buses, and off-road equipment. As OEMs and fleet operators look to solve severe driver

shortages, growing labour costs, and strict EU emissions and safety regulations, the market, which is currently valued in the tens of billions, is expected to grow at a high double-digit CAGR over the next ten years.

The impending Euro 7 emissions regulations and Vision Zero safety measures are important regulatory forces that are pressuring stakeholders to embrace autonomous systems that offer reduced fuel usage, less downtime, and improved operational safety. LiDAR-radar-vision sensor fusion, AI-powered predictive analytics, 5G-enabled V2X connectivity, and digital twin simulation are examples of rapidly developing technological enablers that support use cases ranging from remote-controlled mining and agriculture operations to coordinated platooning on highways.

The localisation of autonomy software for various European road regulations and weather situations is being accelerated by strategic partnerships amongst Tier 1 suppliers, international OEMs, and specialised tech firms. In the meantime, standardised cybersecurity frameworks and teleoperation fallback capabilities are developing to address safety and liability issues. In the areas of logistics, public transportation, construction, and agriculture, Europe's heavy-duty vehicle landscape is expected to become greener, smarter, and significantly more efficient as electrification and hydrogen fuel technologies combine with autonomous.

## Market Segmentation

### Segmentation 1: by Application

Logistics

Public Transportation

Construction and Mining

Others

### Segmentation 2: Global Conventional Heavy-Duty Vehicle Market (by Application)

Construction and Mining

Public Transport

Agriculture

Freight And Logistics

Others

### Segmentation 3: by Propulsion Type

Internal Combustion Engine (ICE) Vehicles

Electric Vehicles (EVs)

Battery Electric Vehicle (BEV)

Plug-in Hybrid Electric Vehicle (PHEV)

Hybrid Electric Vehicle (HEV)

### Segmentation 4: by Vehicle Type

Heavy Trucks

Heavy Buses

Robo Shuttles

### Segmentation 5: by Level of Autonomy

Semi-Autonomous Vehicles

Autonomous Vehicles

### Segmentation 6: by Sensor Type

LiDAR

RADAR

Camera

Others

## Segmentation 7: Global Conventional Heavy-Duty Vehicle Market (by Vehicle Type)

Heavy Trucks

Heavy Buses

## Segmentation 8: by Region

Europe (Germany, France, U.K., Italy, Rest-of-Europe)

## Europe Heavy-Duty Autonomous Vehicles Market Trends, Drivers and Challenges

### Trends

Growing deployment of Level 2+ and Level 4 autonomous systems in heavy trucks and off-road machinery

Convergence of autonomy with vehicle electrification and hydrogen fuel technologies

Advanced sensor fusion (LiDAR, radar, vision) paired with AI-driven predictive analytics

Emergence of digital-twin platforms for real-time simulation and fleet optimization

Development of teleoperation and remote-driving fallback capabilities

5G-enabled V2X connectivity for coordinated platooning and traffic management

Strategic collaborations between OEMs, Tier 1 suppliers and technology startups

## Drivers

Stringent EU emissions targets and safety mandates (e.g., Euro 7, Vision Zero)

Acute driver shortages and rising labor costs across transport and logistics

Pressure to cut operating expenses via fuel savings, downtime reduction and optimized utilization

Corporate ESG commitments accelerating adoption of green autonomous fleets

Maturation of AI, machine-learning algorithms and ruggedized sensor hardware

Expansion of high-bandwidth connectivity infrastructure (5G, edge computing)

## Challenges

High upfront capital expenditure and uncertain total-cost-of-ownership models

Technology reliability and validation under diverse European geographies and weather

Incomplete 5G/charging infrastructure interoperability across member states

Cybersecurity vulnerabilities in connected and autonomous systems

Regulatory fragmentation among EU countries delaying harmonized approvals

Public acceptance and liability frameworks for on-road autonomous operations

How can this report add value to an organization?

This report adds value to an organization by providing in-depth insights into the Europe heavy-duty autonomous vehicle (HDAV) market, enabling data-driven decision-making and strategic growth planning. It highlights key market trends, technological innovations, and competitive dynamics, helping businesses identify emerging opportunities and potential challenges. The report's detailed segmentation by application, propulsion type, vehicle type, level of autonomy, and region allows organizations to target specific markets and optimize their business strategies. Additionally, its coverage of regulatory frameworks, sustainability initiatives, and cybersecurity concerns ensures companies stay compliant with evolving autonomous vehicle policies and safety standards. By leveraging this report, organizations can enhance operational efficiency, make informed investment decisions in automation and AI-driven logistics, and gain a competitive edge in the rapidly transforming heavy-duty transportation sector, ensuring long-term growth and industry leadership.

### Key Market Players and Competition Synopsis

The companies that are profiled in the Europe heavy-duty autonomous vehicle market have been selected based on inputs gathered from primary experts who have analyzed company coverage, product portfolio, and market penetration.

Some of the prominent names in this market are:

AB Volvo

BMW Group

Renault Trucks

Traton Group

ZF Friedrichshafen AG

Schaeffler AG

HOLON GmbH

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