

Global End-to-end L2 Urban Assisted Driving System Market 2026 by Company, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global End-to-end L2 Urban Assisted Driving System market size was valued at US\$ 3174 million in 2025 and is forecast to a readjusted size of US\$ 30049 million by 2032 with a CAGR of 34.0% during review period.

In 2025, the global End-to-end L2 Urban Assisted Driving System (ADAS) market was in its early stages of commercialization, with gross margins ranging from 3.26% to 87.13% depending on company R&D progress and commercialization level. An end-to-end ADAS system refers to an intelligent driving architecture where a data-driven unified deep learning model (or a set of tightly coupled small models) directly maps multi-sensor inputs (cameras, radar, lidar (if applicable), localization, and vehicle status) to executable driving outputs, including intent, target trajectory, and steering/throttle/braking control, with minimal human rules and interfaces. This capability is continuously improved through a closed-loop process of data collection, training, evaluation, and deployment, enabling strategies to generalize to complex traffic conditions and long-tail scenarios. In practice, two main technological forms are typically used. Modular E2E employs neural networks for perception and decision-making/planning while retaining human-designed interfaces (e.g., object lists, occupancy grids, pure electric vehicle functionality) to support engineering decomposition, phased validation, and faster production. A unified (integrated) end-to-end (E2E) approach further integrates perception, prediction, and planning (sometimes including partial control) into a single policy network/large model, and performs joint optimization for the ultimate driving task objective, thereby reducing information loss and error accumulation caused by interfaces. An end-to-end L2 urban assisted driving system refers to a system operating within a limited design domain of complex traffic

environments such as urban roads for passenger vehicles. The system uses a data-driven end-to-end model (a single model or a few tightly coupled models) as its core, processing multi-source sensor and vehicle state inputs (which may include cameras, millimeter-wave radar, lidar, positioning/IMU, vehicle signals, etc.) with minimal manual rules and explicit intermediate interfaces. It directly outputs the driving decisions and executable trajectories/control quantities (e.g., target trajectory, steering/acceleration/deceleration commands) required for urban traffic. It achieves automotive-grade delivery through mass-production-level safety constraints, driver monitoring (DMS), ODD boundary management, fault diagnosis and degradation strategies, and simulation and regression verification systems. Its automation level is still SAE Level 2: the system can control both lateral and longitudinal directions at the same time, but the driver must continuously supervise and be ready to take over at any time. The system's capabilities are continuously iterated through OTA and data closed loop to improve cross-city generalization, long-tail scenario processing and availability consistency.

The commercialization of end-to-end L2 urban assisted driving systems essentially occurs within the 'automotive-grade high-level assisted driving' sector. While still constrained by the responsibility boundaries of Level 2 and the requirement for continuous driver supervision, the direct value of replacing or significantly reducing manual rules and interfaces in the traditional modular stack with a stronger data-driven model in the highly complex urban road scenario is 'faster cross-city generalization, higher iteration efficiency, and stronger user experience consistency.' From a market perspective, urban navigation-assisted driving is expanding from high-priced models to a wider price range, with the penetration rate of urban and highway navigation-assisted driving continuing to increase. Furthermore, 'lightweight or mapless' maps and a stronger data-driven architecture are becoming industry consensus, driving the industry into a more intense mass production competition phase. The supply-side competitive landscape is exhibiting a 'two-pronged approach': one is OEMs focusing on self-developed technologies, using end-to-end capabilities as brand differentiation; the other is third-party solution providers and system suppliers serving multiple OEMs with 'replicable mass-production platforms,' ??accelerating the large-scale deployment of end-to-end solutions in mid-range models. The risks and barriers to end-to-end L2 urban assisted driving are becoming more 'automotive-grade': the focus of market competition is shifting from 'whether it has the function' to 'usability and reliable delivery,' including stability in long-tail scenarios, takeover frequency and quality, robustness to the behavior of different urban traffic participants, and consistency of conservative strategies under extreme weather and low visibility conditions. Since the responsibility for Level 2 still rests with the driver, regulators and the public are more

sensitive to function naming, promotional boundaries, and safety incidents. OEMs and suppliers need to integrate end-to-end models into an auditable engineering system: operational design domain boundary management, driver monitoring, fault diagnosis and degradation, simulation and regression testing, and version governance and continuous software updates. Overall, end-to-end will become one of the mainstream implementation paths for advanced urban assisted driving more quickly, but what truly determines market share is often not the 'end-to-end' label, but whether mass production delivery capabilities and safety reliability can be consistently maintained across a larger user base in the long term.

This report is a detailed and comprehensive analysis for global End-to-end L2 Urban Assisted Driving System market. Both quantitative and qualitative analyses are presented by company, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global End-to-end L2 Urban Assisted Driving System market size and forecasts, in consumption value (\$ Million), 2021-2032

Global End-to-end L2 Urban Assisted Driving System market size and forecasts by region and country, in consumption value (\$ Million), 2021-2032

Global End-to-end L2 Urban Assisted Driving System market size and forecasts, by Type and by Application, in consumption value (\$ Million), 2021-2032

Global End-to-end L2 Urban Assisted Driving System market shares of main players, in revenue (\$ Million), 2021-2026

The Primary Objectives in This Report Are:

- To determine the size of the total market opportunity of global and key countries
- To assess the growth potential for End-to-end L2 Urban Assisted Driving System
- To forecast future growth in each product and end-use market
- To assess competitive factors affecting the marketplace

This report profiles key players in the global End-to-end L2 Urban Assisted Driving System market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Tesla, Nullmax, Momenta, Wayve, Comma.ai, XPeng In+B9:D28c., Huawei, NIO, Li Auto Inc., BYD, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Market segmentation

End-to-end L2 Urban Assisted Driving System market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for Consumption Value by Type and by Application. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

Hardware

Software/Services

Market segment by Driving Level

L2

L2+

Market segment by Technology

Modular E2E

One-piece E2E

Market segment by Application

Mid-to-high-end Models

Economy Models

Market segment by players, this report covers

Tesla

Nullmax

Momenta

Wayve

Comma.ai

XPeng In+B9:D28c.

Huawei

NIO

Li Auto Inc.

BYD

Zeekr (Geely Global)

DeepRoute.ai

ZYT Technology

Horizon

SenseTime

CHERY

Xiaomi

GAC Group

Shanghai Geometrical Perception and Learning Co., Ltd.

Pony AI Inc.

Market segment by regions, regional analysis covers

North America (United States, Canada and Mexico)

Europe (Germany, France, UK, Russia, Italy and Rest of Europe)

Asia-Pacific (China, Japan, South Korea, India, Southeast Asia and Rest of Asia-Pacific)

South America (Brazil, Rest of South America)

Middle East & Africa (Turkey, Saudi Arabia, UAE, Rest of Middle East & Africa)

The content of the study subjects, includes a total of 13 chapters:

Chapter 1, to describe End-to-end L2 Urban Assisted Driving System product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top players of End-to-end L2 Urban Assisted Driving System, with revenue, gross margin, and global market share of End-to-end L2 Urban Assisted Driving System from 2021 to 2026.

Chapter 3, the End-to-end L2 Urban Assisted Driving System competitive situation, revenue, and global market share of top players are analyzed emphatically by landscape contrast.

Chapter 4 and 5, to segment the market size by Type and by Application, with consumption value and growth rate by Type, by Application, from 2021 to 2032.

Chapter 6, 7, 8, 9, and 10, to break the market size data at the country level, with revenue and market share for key countries in the world, from 2021 to 2026. and End-to-end L2 Urban Assisted Driving System market forecast, by regions, by Type and by Application, with consumption value, from 2027 to 2032.

Chapter 11, market dynamics, drivers, restraints, trends, Porters Five Forces analysis.

Chapter 12, the key raw materials and key suppliers, and industry chain of End-to-end L2 Urban Assisted Driving System.

Chapter 13, to describe End-to-end L2 Urban Assisted Driving System research findings and conclusion.

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