

Global ADAS Map Data 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 ADAS Map Data market size was valued at US\$ 1523 million in 2025 and is forecast to a readjusted size of US\$ 3286 million by 2032 with a CAGR of 11.5% during review period.

ADAS Map Data refers to structured road, lane and traffic-rule information developed, compiled and continuously maintained for advanced driver-assistance systems. It extends the vehicle's effective sensing horizon by providing predictive knowledge of road curvature, gradient, elevation, heading, speed limits, traffic signs, lane configurations, lane connectivity, junctions, merges, road boundaries and applicable driving restrictions. The data is delivered through embedded databases, cloud feeds or hybrid onboard-cloud architectures and may be converted into predictive paths through electronic-horizon engines using ADASIS, NDS or proprietary interfaces. The market covers road-attribute ADAS map data, lane-level ADAS map data and high-precision map content primarily used in Level 1 to Level 2+ assistance, including intelligent speed assistance, predictive cruise control, lane keeping, highway assistance, hands-free driving, adaptive lighting, hazard warning and predictive energy management. Commercial value is determined by geographic coverage, attribute accuracy, update frequency, lane-level detail, vehicle-platform compatibility, regulatory compliance and the ability to reuse a common map foundation across vehicle models and assistance functions.

Key Findings

Road-attribute and lane-level data remain the principal volume layers while high-precision content carries higher unit value

Market Trends

ADAS Map Data is evolving from periodically distributed road-attribute databases into continuously updated predictive road models. Traditional products primarily supplied gradient, curvature, heading and speed-limit information, whereas newer systems integrate lane connectivity, complex junction structures, traffic signs, conditional restrictions, road boundaries and operating-domain attributes. Delivery is shifting from fixed offline databases toward hybrid architectures that retain safety-critical data in the vehicle while receiving incremental map tiles and changed attributes from the cloud. NDS.Live supports tile-based, path-based and point-based delivery while reducing the need for large full-map downloads, and major commercial products increasingly combine embedded operation with frequent cloud updates. The market is also moving toward a common data foundation that can serve intelligent speed assistance, electronic horizon, navigation-assisted driving, energy management and selected hands-free functions. The boundary between ADAS maps and HD maps is therefore becoming more functional than purely technical: the same lane geometry may be used in both markets, but revenue is classified according to whether the primary purpose is driver assistance or higher-level automated-driving localization and decision-making.

Market Dynamics

Drivers

Market demand is supported by increasing installation of advanced driver-assistance functions, greater vehicle connectivity and regulatory requirements for vehicle safety systems. Intelligent speed assistance is now required for new motor vehicles sold in the European Union, increasing the importance of accurate and continuously maintained speed-limit data. Predictive adaptive cruise control, curve-speed assistance, lane keeping, adaptive lighting and commercial-vehicle powertrain control also require reliable information about the road beyond the range of onboard cameras and radar. Battery-electric and hybrid vehicles add demand for gradient, curvature, emission-zone and route attributes that support energy and battery management. Broader connected-vehicle deployment enables suppliers to collect road-change observations, distribute incremental updates and extend map-data revenue across the vehicle lifecycle rather than relying solely on initial vehicle production licenses.

Restraints

The market requires substantial recurring investment in road surveying, authoritative traffic-rule acquisition, map compilation, quality verification and regional updates. Speed limits and road restrictions may vary by vehicle category, weather, time, direction and local conditions, making accurate semantic maintenance more difficult than basic road mapping. Automotive customers require long product lifecycles, high availability and consistency across markets, while vehicle-development cycles and OEM validation processes delay commercialization. Geographic-information regulation, mapping qualifications and vehicle-data controls also limit the direct cross-border replication of map-production systems. In addition, camera-based perception and mapless intelligent-driving strategies create substitution pressure for some use cases, particularly where automakers are unwilling to pay separately for map layers that are bundled into broader navigation or driving-assistance contracts.

Opportunities

The strongest opportunities lie in upgrading basic road attributes into lane-level, high-freshness and function-specific map layers. Conditional speed limits, lane connectivity, construction-zone information, traffic-sign semantics and electronic-horizon paths can support regulatory compliance and improve the stability of predictive vehicle control. High-precision ADAS map data creates additional value for highway assistance and hands-free functions without necessarily requiring the full localization and semantic complexity of an automated-driving HD map. Commercial vehicles represent a differentiated opportunity because maps can incorporate truck-specific speed limits, road gradients, restrictions and driving rules for predictive powertrain and safety control. Modular APIs and SDK-based delivery also allow automakers to purchase map content independently from navigation software, supporting OEM-controlled vehicle operating systems and reducing dependence on fully bundled navigation platforms.

Challenges

A central challenge is maintaining consistency across road-level, lane-level and high-precision data layers that may be collected through different technologies and updated at different frequencies. Incorrect or outdated attributes can reduce system performance, particularly for speed assistance, curve control and lane-level functions, creating stringent quality and liability requirements. Crowdsourced and vehicle-generated observations improve freshness but require automated change detection,

confidence scoring, privacy protection and regulatory compliance. Interoperability remains difficult because map suppliers, electronic-horizon providers, vehicle platforms and domain controllers may use different formats and attribute definitions. ADASIS and NDS reduce integration costs, but customer-specific engineering remains significant. Suppliers must also avoid overinvestment in dense high-precision content where OEM demand is moving toward lighter map architectures or sensor-led driving strategies.

Value Chain Analysis

The upstream value chain consists of professional mapping vehicles, satellite and aerial imagery, government road and traffic-rule records, vehicle probes, onboard cameras, GNSS and inertial positioning, traffic-sign observations and connected-infrastructure data. These inputs vary in positional accuracy, update frequency, geographic coverage and licensing rights. Road-attribute products depend heavily on reliable speed-limit, curvature, gradient and restriction information, while lane-level and high-precision products require more detailed geometry, lane markings, boundaries, signs and roadside features. Vehicle crowdsourcing is becoming increasingly important because it can identify changes more rapidly than conventional survey cycles; Mobileye's REM model, for example, uses data from production vehicles to create and refresh semantic road maps.

Midstream suppliers convert raw geospatial observations into connected road and lane networks, code semantic attributes, verify accuracy, manage regional compliance and compile the information into automotive data formats. Electronic-horizon engines and SDKs subsequently identify the most probable path and transmit relevant attributes to vehicle controllers. Downstream customers include automakers, Tier 1 suppliers, ADAS domain-controller providers, navigation-system developers and commercial-vehicle platforms. Value is created through data reuse across vehicle programs, countries and functions, while major costs arise from collection, verification, continuous updates, cloud infrastructure, customer integration and lifecycle support. Platform profitability improves when a single road database supports several assistance functions, but high-precision mapping and extensive customer customization can materially increase delivery costs.

Segment Insights

By content depth, road-attribute ADAS map data remains the largest volume segment because curvature, gradient, heading, speed limits and traffic signs can support a broad range of mass-market safety and efficiency functions. Lane-level ADAS map data

carries higher value by adding lane topology, lane connectivity, merges, exits and lane-specific paths for highway and navigation-assisted driving. High-precision ADAS map data represents the premium layer, providing detailed lane geometry, road boundaries, roadside objects and operating-domain information for hands-free and advanced Level 2+ systems. It overlaps technically with HD maps, but this market assigns products according to their primary commercial use. HERE, TomTom, Mapbox and DMP product portfolios demonstrate the expansion from basic road attributes toward configurable lane and high-precision layers.

By update model, periodic version updates remain important for embedded systems and stable road attributes, while incremental and near-real-time updates are gaining importance for speed-limit changes, road geometry revisions and regulatory compliance. By delivery architecture, embedded and offline maps provide continuity where connectivity is limited, cloud delivery improves freshness and geographic scalability, and hybrid architectures combine local availability with modular updates. Passenger vehicles remain the main application base, but commercial-vehicle ADAS map data offers higher specialization through truck-specific regulations, road gradients and route attributes. Higher update frequency and greater lane-level detail generally increase unit pricing, but also require denser data sources, stronger validation and more complex vehicle integration.

Downstream Market Opportunities

Intelligent speed assistance represents a broad regulatory and safety-driven application because reliable digital maps can complement camera recognition where signs are obscured, absent or conditional. Predictive adaptive cruise control uses road gradient, curvature, junctions and speed restrictions to adjust vehicle speed before reaching a road feature. Lane keeping, highway assistance and hands-free systems require lane topology, connectivity and detailed road geometry to anticipate exits, merges and lane transitions. Adaptive lighting and hazard-warning systems use electronic-horizon information to prepare for curves and road features beyond sensor range. Predictive powertrain and energy-management systems can optimize engine, transmission and battery operation by incorporating topography, curvature and route conditions. Commercial vehicles provide an additional opportunity because map-based predictive control can improve fuel efficiency, driving comfort and compliance with vehicle-specific restrictions.

Regional Insights

Europe is an important demand center because vehicle-safety regulation, cross-border automotive programs and intelligent speed assistance create sustained requirements for accurate speed limits and conditional road rules. All new motor vehicles sold in the European Union have been required to integrate intelligent speed assistance since July 2024, strengthening demand for continuously maintained map content and sensor-map fusion. European OEMs and Tier 1 suppliers also support widespread adoption of electronic-horizon and predictive-control applications.

North America is characterized by growing hands-free highway assistance and large-scale HD and lane-map deployment, while specialized suppliers continue to expand mapped-road coverage for production ADAS systems. Asia-Pacific combines large vehicle-production volumes with strong domestic mapping ecosystems in China, Japan, South Korea and India. Regional suppliers benefit from local road knowledge, mapping qualifications, language and address systems, and established relationships with domestic automakers. China's market places particular emphasis on local geographic-data compliance, while Japan and South Korea maintain specialized automotive map producers. India offers opportunities in locally adapted speed limits, road attributes and commercial-vehicle applications. DMP's expansion across North America, Europe, Japan and Korea illustrates the growing demand for regionally validated high-precision content.

Competitive Landscape Analysis

The ADAS Map Data market is regionally concentrated but has not developed into a single-supplier global monopoly. HERE, TomTom and Mapbox compete through broad geographic coverage, standardized automotive formats, electronic-horizon tools and scalable cloud or hybrid delivery. Mobileye differentiates through vehicle-crowdsourced semantic mapping, while Dynamic Map Platform focuses on high-precision road coverage for hands-free and advanced driver-assistance functions. Regional suppliers in Japan, South Korea, India and China retain advantages in local road attributes, map-production qualifications, regulatory compliance and OEM relationships. Competitive differentiation is shifting from possession of a basic road database toward attribute accuracy, lane-level coverage, update frequency, crowdsourced change detection, vehicle integration and the ability to support multiple assistance functions from a shared data foundation. Bundled map, SDK and update platforms increase customer switching costs, but modular procurement also creates opportunities for specialized suppliers of

speed-limit, electronic-horizon, commercial-vehicle or high-precision data layers.

Report Scope

This report is a detailed and comprehensive analysis for global ADAS Map Data 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 ADAS Map Data market size and forecasts, in consumption value (\$ Million), 2021-2032

Global ADAS Map Data market size and forecasts by region and country, in consumption value (\$ Million), 2021-2032

Global ADAS Map Data market size and forecasts, by Type and by Application, in consumption value (\$ Million), 2021-2032

Global ADAS Map Data 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 ADAS Map Data

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 ADAS Map Data 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 HERE Technologies, TomTom N.V., Mapbox, Inc., Mobileye Global Inc., ZENRIN Co., Ltd., TOYOTA MAPMASTER INCORPORATED, GeoTechnologies, Inc., Hyundai AutoEver Corporation, Dynamic Map Platform Co., Ltd., CE Info Systems Limited (Mappls & MapmyIndia), etc.

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

ADAS Map Data 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 segmentation

Market segment by Type

Road-Attribute ADAS Map Data

Lane-Level ADAS Map Data

High-Precision ADAS Map Data

Market segment by Update Model

Static Data

Semi-dynamic Data

Near-Real-Time Data

Market segment by Delivery Architecture

Embedded and Offline ADAS Map Data

Cloud-Based ADAS Map Data

Hybrid ADAS Map Data

Market segment by Application

Passenger Car

Commercial Vehicle

Market segment by players, this report covers

HERE Technologies

TomTom N.V.

Mapbox, Inc.

Mobileye Global Inc.

ZENRIN Co., Ltd.

TOYOTA MAPMASTER INCORPORATED

GeoTechnologies, Inc.

Hyundai AutoEver Corporation

Dynamic Map Platform Co., Ltd.

CE Info Systems Limited (Mappls & MapmyIndia)

AutoNavi Software Co., Ltd.

Beijing Baidu Netcom Science Technology Co., Ltd.

NavInfo Co., Ltd.

Tencent Holdings Limited (Tencent Maps)

eMapgo Technologies (Beijing) Co., Ltd.

Hangzhou Langge Technology Co., Ltd.

CICV Data Co., Ltd.

Hebei Quandao Technology Co., Ltd.

BrightMap

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)

Chapter Outline

Chapter 1, to describe ADAS Map Data product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top players of ADAS Map Data, with revenue, gross margin, and global market share of ADAS Map Data from 2021 to 2026.

Chapter 3, the ADAS Map Data 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 ADAS Map Data 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 ADAS Map Data.

Chapter 13, to describe ADAS Map Data research findings and conclusion.

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