

Global Highway NOA and Urban NOA Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Highway NOA and Urban NOA market size is expected to reach \$ 88187 million by 2032, rising at a market growth of 25.7% CAGR during the forecast period (2026-2032).

Highway NOA and Urban NOA refer to navigation-based advanced driver assistance functions used in intelligent vehicles. Highway NOA is mainly designed for highways, expressways, elevated roads and other relatively structured road environments, where the vehicle can assist the driver with adaptive cruising, lane keeping, lane centering, automatic lane change, overtaking assistance, ramp entry and exit, and route-based driving under driver supervision. Urban NOA is applied to more complex urban road scenarios, including intersections, traffic lights, pedestrian crossings, non-motor vehicles, unprotected turns, roundabouts, road merging, lane splitting and temporary construction areas. Both functions belong to assisted driving rather than fully autonomous driving, so the driver still needs to monitor the road and take over when necessary.

The core system of Highway NOA and Urban NOA is built on a combination of hardware, software and vehicle control technologies. Major raw materials and components include automotive-grade chips, AI computing chips, cameras, millimeter-wave radar, ultrasonic radar, lidar in some high-end solutions, optical lenses, PCB boards, connectors, wiring harnesses, memory devices, domain controllers, electronic control units and thermal management components. Software elements include perception algorithms, decision-making and planning algorithms, control algorithms, HD maps or light maps, navigation data, positioning modules, simulation testing systems and OTA platforms. The upstream includes semiconductor suppliers, sensor manufacturers, map and positioning service providers, automotive electronics

companies and autonomous driving software developers. The downstream customers are mainly passenger car OEMs, especially new energy vehicle manufacturers, premium car brands, smart EV brands and traditional automakers upgrading intelligent driving functions.

The market for Highway NOA and Urban NOA is developing rapidly as intelligent driving becomes one of the most important directions in the automotive industry. Highway NOA has entered a relatively mature commercialization stage because highway scenarios are more structured, with clearer lane markings, more predictable traffic flow and fewer mixed traffic participants. Urban NOA is developing at a faster but more challenging pace, as urban roads require stronger perception, prediction, decision-making and control capabilities. The overall industry trend is moving from highway-only NOA to integrated highway, urban and parking assisted driving solutions, and from function-based assistance to scenario-based intelligent driving experience.

In terms of technology, the market is shifting from HD map-dependent solutions to light-map and map-free solutions. Sensor configurations are also becoming more diversified, including vision-based solutions, radar-camera fusion solutions and lidar fusion solutions. At the same time, algorithms are evolving from rule-based logic to AI-driven, data-driven and end-to-end architectures. Vehicle electronic architecture is becoming more centralized, which supports the integration of NOA functions with domain controllers, high-performance computing platforms, vehicle operating systems and cloud-based training systems. OTA upgrades are also becoming an important tool for automakers to improve NOA performance after vehicle delivery.

From a regional perspective, China is one of the most active markets, supported by fast growth of new energy vehicles, strong competition among domestic automakers, high consumer acceptance of intelligent driving and a relatively complete local supply chain. North America has advantages in software platforms, AI chips and autonomous driving technology ecosystems, while Europe focuses more on safety verification, compliance and gradual function rollout. Japan and South Korea are also promoting NOA functions through established automakers and automotive electronics suppliers.

The main growth drivers include increasing consumer demand for intelligent driving, faster penetration of electric vehicles, continuous upgrades of vehicle electronic and electrical architecture, falling costs of sensors and computing hardware, and rapid improvement of AI algorithms. In addition, competition among automakers is pushing NOA from premium optional features to more mainstream configurations. Urban commuting pressure, long-distance highway driving fatigue, demand for safer driving

experience and the expansion of software-defined vehicles are also supporting market growth. Cooperation among OEMs, Tier 1 suppliers, chip companies, sensor manufacturers and software developers is accelerating product maturity. However, the market still faces challenges such as functional safety verification, driver misuse, complex urban edge cases, weather adaptability, regulatory differences and responsibility boundaries.

This report studies the global Highway NOA and Urban NOA demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Highway NOA and Urban NOA, and provides market size (US\$ million) and Year-over-Year (YoY) growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Highway NOA and Urban NOA that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Highway NOA and Urban NOA total market, 2021-2032, (USD Million)

Global Highway NOA and Urban NOA total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Highway NOA and Urban NOA total market, key domestic companies, and share, (USD Million)

Global Highway NOA and Urban NOA revenue by player, revenue and market share 2021-2026, (USD Million)

Global Highway NOA and Urban NOA total market by Type, CAGR, 2021-2032, (USD Million)

Global Highway NOA and Urban NOA total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Highway NOA and Urban NOA 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 Momenta, Tesla, NIO, Li Auto, XPeng, Xiaomi, Huawei, DEEPROUTE, Horizon Robotics, Shenzhen Zhuoyu Technology Co., Ltd., etc.

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

Stakeholders would have ease in decision-making through various strategy matrices

used in analyzing the world Highway NOA and Urban NOA market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), by player, by regions, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Highway NOA and Urban NOA Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Highway NOA and Urban NOA Market, Segmentation by Type:

Highway NOA

Urban NOA

Global Highway NOA and Urban NOA Market, Segmentation by Sensor Configuration:

Vision-based NOA

Radar-camera Fusion NOA

LiDAR Fusion NOA

Global Highway NOA and Urban NOA Market, Segmentation by Application:

Sedan

SUV

Others

Companies Profiled:

Momenta

Tesla

NIO

Li Auto

XPeng

Xiaomi

Huawei

DEEPROUTE

Horizon Robotics

Shenzhen Zhuoyu Technology Co., Ltd.

QCraft

Baidu Apollo

WeRide

Motovis

Key Questions Answered

1. How big is the global Highway NOA and Urban NOA market?
2. What is the demand of the global Highway NOA and Urban NOA market?
3. What is the year over year growth of the global Highway NOA and Urban NOA market?
4. What is the total value of the global Highway NOA and Urban NOA market?
5. Who are the Major Players in the global Highway NOA and Urban NOA market?
6. What are the growth factors driving the market demand?

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