

Global In-vehicle Urban Navigation on Autopilot (NOA) 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 In-vehicle Urban Navigation on Autopilot (NOA) market size was valued at US\$ 8649 million in 2025 and is forecast to a readjusted size of US\$ 76526 million by 2032 with a CAGR of 33.4% during review period.

In-vehicle Urban Navigation on Autopilot (NOA) refers to an advanced driver assistance function installed in passenger vehicles and designed for complex urban road environments. It uses navigation information, vehicle perception, positioning, decision-making algorithms and vehicle control systems to assist the driver in following a planned route in city traffic. The system can support functions such as lane keeping, adaptive speed control, automatic lane changing, traffic light recognition, intersection passing, obstacle avoidance, merging, turning assistance and route-based driving decisions. It remains an assisted driving function rather than fully autonomous driving, so the driver must continue to monitor the road and be ready to take over at any time. Compared with highway NOA, urban NOA faces more complex and dynamic traffic conditions, including pedestrians, bicycles, electric scooters, parked vehicles, construction zones, irregular lane markings, complex intersections and mixed traffic flows.

From the industry chain perspective, the upstream of In-vehicle Urban NOA includes cameras, millimeter-wave radar, ultrasonic radar, LiDAR in some high-end configurations, high-precision positioning modules, inertial navigation units, AI chips, memory chips, driving domain controllers, PCBs, connectors, wiring harnesses, electronic components, map data, cloud computing resources, simulation tools and algorithm software. Midstream participants include automakers, intelligent driving solution providers, sensor suppliers, chip companies, domain controller manufacturers

and software algorithm developers. Downstream customers mainly include passenger car OEMs, new energy vehicle brands, smart vehicle platforms, Robotaxi operators and mobility fleet operators. The function is mainly installed in smart electric vehicles, mid- to high-end passenger cars and models that emphasize intelligent driving experience, and it is gradually expanding toward more mainstream vehicle segments.

The In-vehicle Urban Navigation on Autopilot (NOA) market is growing quickly as the automotive industry moves from basic L2 assisted driving toward higher-level, navigation-based intelligent driving functions. The main industry trend is the expansion from highway NOA to urban NOA, because urban roads represent a more frequent daily driving scenario and create stronger user value. Automakers are using urban NOA as a key selling point for smart vehicles, especially electric vehicles, while intelligent driving suppliers are developing more standardized and scalable solutions to support mass production across different vehicle platforms.

In terms of technology, the market is moving from map-dependent solutions toward light-map and map-free solutions. This trend is driven by the need to reduce map production cost, speed up city coverage and improve adaptability to real-time road changes. At the same time, perception systems are becoming more powerful, with camera-based solutions, LiDAR-based solutions and multi-sensor fusion solutions all developing in parallel. AI algorithms, end-to-end models, data closed-loop systems, simulation testing, cloud training and OTA software updates are becoming important competitive factors. As hardware costs decline, urban NOA is gradually moving from premium models to mass-market vehicles.

Regionally, China is one of the most active markets for urban NOA deployment, supported by strong new energy vehicle penetration, intense competition among smart EV brands, a complete local supply chain and fast consumer acceptance of intelligent driving functions. North America is mainly driven by technology-oriented automakers and software-defined vehicle platforms, with stronger emphasis on software capability and data accumulation. Europe is more cautious due to stricter regulation, safety verification requirements and conservative deployment strategies. Other regions remain at an earlier stage, with demand mainly concentrated in premium electric vehicles and selected mobility service applications.

Market growth is driven by multiple factors. First, consumers increasingly view intelligent driving as an important vehicle feature, especially in daily commuting and congested urban traffic. Second, automakers need urban NOA to differentiate their models and strengthen brand competitiveness. Third, the rapid development of AI perception,

planning and control algorithms is improving system capability in complex city environments. Fourth, the cost of cameras, radar, LiDAR, chips and domain controllers continues to decline, making wider adoption more feasible. Fifth, electric vehicle platforms are better suited for software-defined architecture, centralized electronic control and OTA updates. In addition, growing data accumulation, stronger supplier capabilities, demand from OEMs without full-stack self-development ability, and the commercialization of intelligent driving software all support market expansion. However, the market still faces challenges such as safety validation difficulty, unclear responsibility boundaries, regulatory uncertainty, consumer trust issues and high complexity of urban traffic. Overall, urban NOA is becoming one of the most important development directions in the intelligent vehicle industry.

This report is a detailed and comprehensive analysis for global In-vehicle Urban Navigation on Autopilot (NOA) 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 In-vehicle Urban Navigation on Autopilot (NOA) market size and forecasts, in consumption value (\$ Million), 2021-2032

Global In-vehicle Urban Navigation on Autopilot (NOA) market size and forecasts by region and country, in consumption value (\$ Million), 2021-2032

Global In-vehicle Urban Navigation on Autopilot (NOA) market size and forecasts, by Type and by Application, in consumption value (\$ Million), 2021-2032

Global In-vehicle Urban Navigation on Autopilot (NOA) 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 In-vehicle Urban Navigation on Autopilot

(NOA)

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 In-vehicle Urban Navigation on Autopilot (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.

Market segmentation

In-vehicle Urban Navigation on Autopilot (NOA) 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

Vision-based Urban NOA

LiDAR-based Urban NOA

Multi-sensor Fusion Urban NOA

Market segment by Development Entity

OEM Self-developed Urban NOA

Supplier-developed Urban NOA

Joint-development Urban NOA

Market segment by Application

Sedan

SUV

Others

Market segment by players, this report covers

Momenta

Tesla

NIO

Li Auto

XPeng

Xiaomi

Huawei

DEEPROUTE

Horizon Robotics

Shenzhen Zhuoyu Technology Co., Ltd.

QCraft

Baidu Apollo

WeRide

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 In-vehicle Urban Navigation on Autopilot (NOA) product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top players of In-vehicle Urban Navigation on Autopilot (NOA), with revenue, gross margin, and global market share of In-vehicle Urban Navigation on Autopilot (NOA) from 2021 to 2026.

Chapter 3, the In-vehicle Urban Navigation on Autopilot (NOA) 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 In-vehicle Urban Navigation on Autopilot (NOA) 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 In-vehicle

Urban Navigation on Autopilot (NOA).

Chapter 13, to describe In-vehicle Urban Navigation on Autopilot (NOA) research findings and conclusion.

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