

Global In-vehicle Urban Navigation on Autopilot (NOA) Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global In-vehicle Urban Navigation on Autopilot (NOA) market size is expected to reach \$ 76526 million by 2032, rising at a market growth of 33.4% CAGR during the forecast period (2026-2032).

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 studies the global In-vehicle Urban Navigation on Autopilot (NOA) demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for In-vehicle Urban Navigation on Autopilot (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 In-vehicle Urban Navigation on Autopilot (NOA) that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global In-vehicle Urban Navigation on Autopilot (NOA) total market, 2021-2032, (USD Million)

Global In-vehicle Urban Navigation on Autopilot (NOA) total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: In-vehicle Urban Navigation on Autopilot (NOA) total market, key domestic companies, and share, (USD Million)

Global In-vehicle Urban Navigation on Autopilot (NOA) revenue by player, revenue and market share 2021-2026, (USD Million)

Global In-vehicle Urban Navigation on Autopilot (NOA) total market by Type, CAGR, 2021-2032, (USD Million)

Global In-vehicle Urban Navigation on Autopilot (NOA) total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the world In-vehicle Urban Navigation on Autopilot (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 In-vehicle Urban Navigation on Autopilot (NOA) Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global In-vehicle Urban Navigation on Autopilot (NOA) Market, Segmentation by Type:

Vision-based Urban NOA

LiDAR-based Urban NOA

Multi-sensor Fusion Urban NOA

Global In-vehicle Urban Navigation on Autopilot (NOA) Market, Segmentation by Development Entity:

OEM Self-developed Urban NOA

Supplier-developed Urban NOA

Joint-development Urban NOA

Global In-vehicle Urban Navigation on Autopilot (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

Key Questions Answered

1. How big is the global In-vehicle Urban Navigation on Autopilot (NOA) market?
2. What is the demand of the global In-vehicle Urban Navigation on Autopilot (NOA) market?
3. What is the year over year growth of the global In-vehicle Urban Navigation on Autopilot (NOA) market?
4. What is the total value of the global In-vehicle Urban Navigation on Autopilot (NOA) market?
5. Who are the Major Players in the global In-vehicle Urban Navigation on Autopilot (NOA) market?
6. What are the growth factors driving the market demand?

Contents

1 SUPPLY SUMMARY

- 1.1 In-vehicle Urban Navigation on Autopilot (NOA) Introduction
- 1.2 World In-vehicle Urban Navigation on Autopilot (NOA) Market Size & Forecast (2021 & 2025 & 2032)
- 1.3 World In-vehicle Urban Navigation on Autopilot (NOA) Total Market by Region (by Headquarter Location)
 - 1.3.1 World In-vehicle Urban Navigation on Autopilot (NOA) Market Size by Region (2021-2032), (by Headquarter Location)
 - 1.3.2 United States Based Company In-vehicle Urban Navigation on Autopilot (NOA) Revenue (2021-2032)
 - 1.3.3 China Based Company In-vehicle Urban Navigation on Autopilot (NOA) Revenue (2021-2032)
 - 1.3.4 Europe Based Company In-vehicle Urban Navigation on Autopilot (NOA) Revenue (2021-2032)
 - 1.3.5 Japan Based Company In-vehicle Urban Navigation on Autopilot (NOA) Revenue (2021-2032)
 - 1.3.6 South Korea Based Company In-vehicle Urban Navigation on Autopilot (NOA) Revenue (2021-2032)
 - 1.3.7 ASEAN Based Company In-vehicle Urban Navigation on Autopilot (NOA) Revenue (2021-2032)
 - 1.3.8 India Based Company In-vehicle Urban Navigation on Autopilot (NOA) Revenue (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
 - 1.4.1 In-vehicle Urban Navigation on Autopilot (NOA) Market Drivers
 - 1.4.2 Factors Affecting Demand
 - 1.4.3 Major Market Trends

2 DEMAND SUMMARY

- 2.1 World In-vehicle Urban Navigation on Autopilot (NOA) Consumption Value (2021-2032)
- 2.2 World In-vehicle Urban Navigation on Autopilot (NOA) Consumption Value by Region
 - 2.2.1 World In-vehicle Urban Navigation on Autopilot (NOA) Consumption Value by Region (2021-2026)
 - 2.2.2 World In-vehicle Urban Navigation on Autopilot (NOA) Consumption Value

Forecast by Region (2027-2032)

2.3 United States In-vehicle Urban Navigation on Autopilot (NOA) Consumption Value (2021-2032)

2.4 China In-vehicle Urban Navigation on Autopilot (NOA) Consumption Value (2021-2032)

2.5 Europe In-vehicle Urban Navigation on Autopilot (NOA) Consumption Value (2021-2032)

2.6 Japan In-vehicle Urban Navigation on Autopilot (NOA) Consumption Value (2021-2032)

2.7 South Korea In-vehicle Urban Navigation on Autopilot (NOA) Consumption Value (2021-2032)

2.8 ASEAN In-vehicle Urban Navigation on Autopilot (NOA) Consumption Value (2021-2032)

2.9 India In-vehicle Urban Navigation on Autopilot (NOA) Consumption Value (2021-2032)

3 WORLD IN-VEHICLE URBAN NAVIGATION ON AUTOPILOT (NOA) COMPANIES COMPETITIVE ANALYSIS

3.1 World In-vehicle Urban Navigation on Autopilot (NOA) Revenue by Player (2021-2026)

3.2 Industry Rank and Concentration Rate (CR)

3.2.1 Global In-vehicle Urban Navigation on Autopilot (NOA) Industry Rank of Major Players

3.2.2 Global Concentration Ratios (CR4) for In-vehicle Urban Navigation on Autopilot (NOA) in 2025

3.2.3 Global Concentration Ratios (CR8) for In-vehicle Urban Navigation on Autopilot (NOA) in 2025

3.3 In-vehicle Urban Navigation on Autopilot (NOA) Company Evaluation Quadrant

3.4 In-vehicle Urban Navigation on Autopilot (NOA) Market: Overall Company Footprint Analysis

3.4.1 In-vehicle Urban Navigation on Autopilot (NOA) Market: Region Footprint

3.4.2 In-vehicle Urban Navigation on Autopilot (NOA) Market: Company Product Type Footprint

3.4.3 In-vehicle Urban Navigation on Autopilot (NOA) Market: Company Product Application Footprint

3.5 Competitive Environment

3.5.1 Historical Structure of the Industry

3.5.2 Barriers of Market Entry

3.5.3 Factors of Competition

3.6 Mergers & Acquisitions Activity

4 UNITED STATES VS CHINA VS REST OF WORLD (BY HEADQUARTER LOCATION)

4.1 United States VS China: In-vehicle Urban Navigation on Autopilot (NOA) Revenue Comparison (by Headquarter Location)

4.1.1 United States VS China: In-vehicle Urban Navigation on Autopilot (NOA) Revenue Comparison (2021 & 2025 & 2032) (by Headquarter Location)

4.1.2 United States VS China: In-vehicle Urban Navigation on Autopilot (NOA) Revenue Market Share Comparison (2021 & 2025 & 2032)

4.2 United States Based Companies VS China Based Companies: In-vehicle Urban Navigation on Autopilot (NOA) Consumption Value Comparison

4.2.1 United States VS China: In-vehicle Urban Navigation on Autopilot (NOA) Consumption Value Comparison (2021 & 2025 & 2032)

4.2.2 United States VS China: In-vehicle Urban Navigation on Autopilot (NOA) Consumption Value Market Share Comparison (2021 & 2025 & 2032)

4.3 United States Based In-vehicle Urban Navigation on Autopilot (NOA) Companies and Market Share, 2021-2026

4.3.1 United States Based In-vehicle Urban Navigation on Autopilot (NOA) Companies, Headquarters (States, Country)

4.3.2 United States Based Companies In-vehicle Urban Navigation on Autopilot (NOA) Revenue, (2021-2026)

4.4 China Based Companies In-vehicle Urban Navigation on Autopilot (NOA) Revenue and Market Share, 2021-2026

4.4.1 China Based In-vehicle Urban Navigation on Autopilot (NOA) Companies, Company Headquarters (Province, Country)

4.4.2 China Based Companies In-vehicle Urban Navigation on Autopilot (NOA) Revenue, (2021-2026)

4.5 Rest of World Based In-vehicle Urban Navigation on Autopilot (NOA) Companies and Market Share, 2021-2026

4.5.1 Rest of World Based In-vehicle Urban Navigation on Autopilot (NOA) Companies, Headquarters (Province, Country)

4.5.2 Rest of World Based Companies In-vehicle Urban Navigation on Autopilot (NOA) Revenue (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World In-vehicle Urban Navigation on Autopilot (NOA) Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 Vision-based Urban NOA

5.2.2 LiDAR-based Urban NOA

5.2.3 Multi-sensor Fusion Urban NOA

5.3 Market Segment by Type

5.3.1 World In-vehicle Urban Navigation on Autopilot (NOA) Market Size by Type (2021-2026)

5.3.2 World In-vehicle Urban Navigation on Autopilot (NOA) Market Size by Type (2027-2032)

5.3.3 World In-vehicle Urban Navigation on Autopilot (NOA) Market Size Market Share by Type (2027-2032)

6 MARKET ANALYSIS BY DEVELOPMENT ENTITY

6.1 World In-vehicle Urban Navigation on Autopilot (NOA) Market Size Overview by Development Entity: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Development Entity

6.2.1 OEM Self-developed Urban NOA

6.2.2 Supplier-developed Urban NOA

6.2.3 Joint-development Urban NOA

6.3 Market Segment by Development Entity

6.3.1 World In-vehicle Urban Navigation on Autopilot (NOA) Market Size by Development Entity (2021-2026)

6.3.2 World In-vehicle Urban Navigation on Autopilot (NOA) Market Size by Development Entity (2027-2032)

6.3.3 World In-vehicle Urban Navigation on Autopilot (NOA) Market Size Market Share by Development Entity (2027-2032)

7 MARKET ANALYSIS BY APPLICATION

7.1 World In-vehicle Urban Navigation on Autopilot (NOA) Market Size Overview by Application: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Application

7.2.1 Sedan

7.2.2 SUV

7.2.3 Others

7.3 Market Segment by Application

7.3.1 World In-vehicle Urban Navigation on Autopilot (NOA) Market Size by Application (2021-2026)

7.3.2 World In-vehicle Urban Navigation on Autopilot (NOA) Market Size by Application (2027-2032)

7.3.3 World In-vehicle Urban Navigation on Autopilot (NOA) Market Size Market Share by Application (2021-2032)

8 COMPANY PROFILES

8.1 Momena

8.1.1 Momena Details

8.1.2 Momena Major Business

8.1.3 Momena In-vehicle Urban Navigation on Autopilot (NOA) Product and Services

8.1.4 Momena In-vehicle Urban Navigation on Autopilot (NOA) Revenue, Gross Margin and Market Share (2021-2026)

8.1.5 Momena Recent Developments/Updates

8.1.6 Momena Competitive Strengths & Weaknesses

8.2 Tesla

8.2.1 Tesla Details

8.2.2 Tesla Major Business

8.2.3 Tesla In-vehicle Urban Navigation on Autopilot (NOA) Product and Services

8.2.4 Tesla In-vehicle Urban Navigation on Autopilot (NOA) Revenue, Gross Margin and Market Share (2021-2026)

8.2.5 Tesla Recent Developments/Updates

8.2.6 Tesla Competitive Strengths & Weaknesses

8.3 NIO

8.3.1 NIO Details

8.3.2 NIO Major Business

8.3.3 NIO In-vehicle Urban Navigation on Autopilot (NOA) Product and Services

8.3.4 NIO In-vehicle Urban Navigation on Autopilot (NOA) Revenue, Gross Margin and Market Share (2021-2026)

8.3.5 NIO Recent Developments/Updates

8.3.6 NIO Competitive Strengths & Weaknesses

8.4 Li Auto

8.4.1 Li Auto Details

8.4.2 Li Auto Major Business

8.4.3 Li Auto In-vehicle Urban Navigation on Autopilot (NOA) Product and Services

8.4.4 Li Auto In-vehicle Urban Navigation on Autopilot (NOA) Revenue, Gross Margin and Market Share (2021-2026)

8.4.5 Li Auto Recent Developments/Updates

8.4.6 Li Auto Competitive Strengths & Weaknesses

8.5 XPeng

8.5.1 XPeng Details

8.5.2 XPeng Major Business

8.5.3 XPeng In-vehicle Urban Navigation on Autopilot (NOA) Product and Services

8.5.4 XPeng In-vehicle Urban Navigation on Autopilot (NOA) Revenue, Gross Margin and Market Share (2021-2026)

8.5.5 XPeng Recent Developments/Updates

8.5.6 XPeng Competitive Strengths & Weaknesses

8.6 Xiaomi

8.6.1 Xiaomi Details

8.6.2 Xiaomi Major Business

8.6.3 Xiaomi In-vehicle Urban Navigation on Autopilot (NOA) Product and Services

8.6.4 Xiaomi In-vehicle Urban Navigation on Autopilot (NOA) Revenue, Gross Margin and Market Share (2021-2026)

8.6.5 Xiaomi Recent Developments/Updates

8.6.6 Xiaomi Competitive Strengths & Weaknesses

8.7 Huawei

8.7.1 Huawei Details

8.7.2 Huawei Major Business

8.7.3 Huawei In-vehicle Urban Navigation on Autopilot (NOA) Product and Services

8.7.4 Huawei In-vehicle Urban Navigation on Autopilot (NOA) Revenue, Gross Margin and Market Share (2021-2026)

8.7.5 Huawei Recent Developments/Updates

8.7.6 Huawei Competitive Strengths & Weaknesses

8.8 DEEPROUTE

8.8.1 DEEPROUTE Details

8.8.2 DEEPROUTE Major Business

8.8.3 DEEPROUTE In-vehicle Urban Navigation on Autopilot (NOA) Product and Services

8.8.4 DEEPROUTE In-vehicle Urban Navigation on Autopilot (NOA) Revenue, Gross Margin and Market Share (2021-2026)

8.8.5 DEEPROUTE Recent Developments/Updates

8.8.6 DEEPROUTE Competitive Strengths & Weaknesses

8.9 Horizon Robotics

8.9.1 Horizon Robotics Details

8.9.2 Horizon Robotics Major Business

8.9.3 Horizon Robotics In-vehicle Urban Navigation on Autopilot (NOA) Product and

Services

8.9.4 Horizon Robotics In-vehicle Urban Navigation on Autopilot (NOA) Revenue, Gross Margin and Market Share (2021-2026)

8.9.5 Horizon Robotics Recent Developments/Updates

8.9.6 Horizon Robotics Competitive Strengths & Weaknesses

8.10 Shenzhen Zhuoyu Technology Co., Ltd.

8.10.1 Shenzhen Zhuoyu Technology Co., Ltd. Details

8.10.2 Shenzhen Zhuoyu Technology Co., Ltd. Major Business

8.10.3 Shenzhen Zhuoyu Technology Co., Ltd. In-vehicle Urban Navigation on Autopilot (NOA) Product and Services

8.10.4 Shenzhen Zhuoyu Technology Co., Ltd. In-vehicle Urban Navigation on Autopilot (NOA) Revenue, Gross Margin and Market Share (2021-2026)

8.10.5 Shenzhen Zhuoyu Technology Co., Ltd. Recent Developments/Updates

8.10.6 Shenzhen Zhuoyu Technology Co., Ltd. Competitive Strengths & Weaknesses

8.11 QCraft

8.11.1 QCraft Details

8.11.2 QCraft Major Business

8.11.3 QCraft In-vehicle Urban Navigation on Autopilot (NOA) Product and Services

8.11.4 QCraft In-vehicle Urban Navigation on Autopilot (NOA) Revenue, Gross Margin and Market Share (2021-2026)

8.11.5 QCraft Recent Developments/Updates

8.11.6 QCraft Competitive Strengths & Weaknesses

8.12 Baidu Apollo

8.12.1 Baidu Apollo Details

8.12.2 Baidu Apollo Major Business

8.12.3 Baidu Apollo In-vehicle Urban Navigation on Autopilot (NOA) Product and Services

8.12.4 Baidu Apollo In-vehicle Urban Navigation on Autopilot (NOA) Revenue, Gross Margin and Market Share (2021-2026)

8.12.5 Baidu Apollo Recent Developments/Updates

8.12.6 Baidu Apollo Competitive Strengths & Weaknesses

8.13 WeRide

8.13.1 WeRide Details

8.13.2 WeRide Major Business

8.13.3 WeRide In-vehicle Urban Navigation on Autopilot (NOA) Product and Services

8.13.4 WeRide In-vehicle Urban Navigation on Autopilot (NOA) Revenue, Gross Margin and Market Share (2021-2026)

8.13.5 WeRide Recent Developments/Updates

8.13.6 WeRide Competitive Strengths & Weaknesses

9 INDUSTRY CHAIN ANALYSIS

9.1 In-vehicle Urban Navigation on Autopilot (NOA) Industry Chain

9.2 In-vehicle Urban Navigation on Autopilot (NOA) Upstream Analysis

9.3 In-vehicle Urban Navigation on Autopilot (NOA) Midstream Analysis

9.4 In-vehicle Urban Navigation on Autopilot (NOA) Downstream Analysis

10 RESEARCH FINDINGS AND CONCLUSION

11 APPENDIX

11.1 Methodology

11.2 Research Process and Data Source

11.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. World In-vehicle Urban Navigation on Autopilot (NOA) Revenue by Region (2021, 2025 and 2032) & (USD Million), (by Headquarter Location)

Table 2. World In-vehicle Urban Navigation on Autopilot (NOA) Revenue by Region (2021-2026) & (USD Million), (by Headquarter Location)

Table 3. World In-vehicle Urban Navigation on Autopilot (NOA) Revenue by Region (2027-2032) & (USD Million), (by Headquarter Location)

Table 4. World In-vehicle Urban Navigation on Autopilot (NOA) Revenue Market Share by Region (2021-2026), (by Headquarter Location)

Table 5. World In-vehicle Urban Navigation on Autopilot (NOA) Revenue Market Share by Region (2027-2032), (by Headquarter Location)

Table 6. Major Market Trends

Table 7. World In-vehicle Urban Navigation on Autopilot (NOA) Consumption Value Growth Rate Forecast by Region (2021 & 2025 & 2032) & (USD Million)

Table 8. World In-vehicle Urban Navigation on Autopilot (NOA) Consumption Value by Region (2021-2026) & (USD Million)

Table 9. World In-vehicle Urban Navigation on Autopilot (NOA) Consumption Value Forecast by Region (2027-2032) & (USD Million)

Table 10. World In-vehicle Urban Navigation on Autopilot (NOA) Revenue by Player (2021-2026) & (USD Million)

Table 11. Revenue Market Share of Key In-vehicle Urban Navigation on Autopilot (NOA) Players in 2025

Table 12. World In-vehicle Urban Navigation on Autopilot (NOA) Industry Rank of Major Player, Based on Revenue in 2025

Table 13. Global In-vehicle Urban Navigation on Autopilot (NOA) Company Evaluation Quadrant

Table 14. Head Office of Key In-vehicle Urban Navigation on Autopilot (NOA) Players

Table 15. In-vehicle Urban Navigation on Autopilot (NOA) Market: Company Product Type Footprint

Table 16. In-vehicle Urban Navigation on Autopilot (NOA) Market: Company Product Application Footprint

Table 17. In-vehicle Urban Navigation on Autopilot (NOA) Mergers & Acquisitions Activity

Table 18. United States VS China In-vehicle Urban Navigation on Autopilot (NOA) Revenue Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 19. United States VS China In-vehicle Urban Navigation on Autopilot (NOA)

Consumption Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 20. United States Based In-vehicle Urban Navigation on Autopilot (NOA) Companies, Headquarters (States, Country)

Table 21. United States Based Companies In-vehicle Urban Navigation on Autopilot (NOA) Revenue, (2021-2026) & (USD Million)

Table 22. United States Based Companies In-vehicle Urban Navigation on Autopilot (NOA) Revenue Market Share (2021-2026)

Table 23. China Based In-vehicle Urban Navigation on Autopilot (NOA) Companies, Headquarters (Province, Country)

Table 24. China Based Companies In-vehicle Urban Navigation on Autopilot (NOA) Revenue, (2021-2026) & (USD Million)

Table 25. China Based Companies In-vehicle Urban Navigation on Autopilot (NOA) Revenue Market Share (2021-2026)

Table 26. Rest of World Based In-vehicle Urban Navigation on Autopilot (NOA) Companies, Headquarters (Province, Country)

Table 27. Rest of World Based Companies In-vehicle Urban Navigation on Autopilot (NOA) Revenue (2021-2026) & (USD Million)

Table 28. Rest of World Based Companies In-vehicle Urban Navigation on Autopilot (NOA) Revenue Market Share (2021-2026)

Table 29. World In-vehicle Urban Navigation on Autopilot (NOA) Market Size by Type, (USD Million), 2021 & 2025 & 2032

Table 30. World In-vehicle Urban Navigation on Autopilot (NOA) Market Size Value by Type (2021-2026) & (USD Million)

Table 31. World In-vehicle Urban Navigation on Autopilot (NOA) Market Size by Type (2027-2032) & (USD Million)

Table 32. World In-vehicle Urban Navigation on Autopilot (NOA) Market Size by Development Entity, (USD Million), 2021 & 2025 & 2032

Table 33. World In-vehicle Urban Navigation on Autopilot (NOA) Market Size Value by Development Entity (2021-2026) & (USD Million)

Table 34. World In-vehicle Urban Navigation on Autopilot (NOA) Market Size by Development Entity (2027-2032) & (USD Million)

Table 35. World In-vehicle Urban Navigation on Autopilot (NOA) Market Size by Application, (USD Million), 2021 & 2025 & 2032

Table 36. World In-vehicle Urban Navigation on Autopilot (NOA) Market Size by Application (2021-2026) & (USD Million)

Table 37. World In-vehicle Urban Navigation on Autopilot (NOA) Market Size by Application (2027-2032) & (USD Million)

Table 38. Momena Basic Information, Manufacturing Base and Competitors

Table 39. Momena Major Business

Table 40. Momenta In-vehicle Urban Navigation on Autopilot (NOA) Product and Services
Table 41. Momenta In-vehicle Urban Navigation on Autopilot (NOA) Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 42. Momenta Recent Developments/Updates
Table 43. Momenta Competitive Strengths & Weaknesses
Table 44. Tesla Basic Information, Manufacturing Base and Competitors
Table 45. Tesla Major Business
Table 46. Tesla In-vehicle Urban Navigation on Autopilot (NOA) Product and Services
Table 47. Tesla In-vehicle Urban Navigation on Autopilot (NOA) Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 48. Tesla Recent Developments/Updates
Table 49. Tesla Competitive Strengths & Weaknesses
Table 50. NIO Basic Information, Manufacturing Base and Competitors
Table 51. NIO Major Business
Table 52. NIO In-vehicle Urban Navigation on Autopilot (NOA) Product and Services
Table 53. NIO In-vehicle Urban Navigation on Autopilot (NOA) Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 54. NIO Recent Developments/Updates
Table 55. NIO Competitive Strengths & Weaknesses
Table 56. Li Auto Basic Information, Manufacturing Base and Competitors
Table 57. Li Auto Major Business
Table 58. Li Auto In-vehicle Urban Navigation on Autopilot (NOA) Product and Services
Table 59. Li Auto In-vehicle Urban Navigation on Autopilot (NOA) Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 60. Li Auto Recent Developments/Updates
Table 61. Li Auto Competitive Strengths & Weaknesses
Table 62. XPeng Basic Information, Manufacturing Base and Competitors
Table 63. XPeng Major Business
Table 64. XPeng In-vehicle Urban Navigation on Autopilot (NOA) Product and Services
Table 65. XPeng In-vehicle Urban Navigation on Autopilot (NOA) Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 66. XPeng Recent Developments/Updates
Table 67. XPeng Competitive Strengths & Weaknesses
Table 68. Xiaomi Basic Information, Manufacturing Base and Competitors
Table 69. Xiaomi Major Business
Table 70. Xiaomi In-vehicle Urban Navigation on Autopilot (NOA) Product and Services
Table 71. Xiaomi In-vehicle Urban Navigation on Autopilot (NOA) Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 72. Xiaomi Recent Developments/Updates
Table 73. Xiaomi Competitive Strengths & Weaknesses
Table 74. Huawei Basic Information, Manufacturing Base and Competitors
Table 75. Huawei Major Business
Table 76. Huawei In-vehicle Urban Navigation on Autopilot (NOA) Product and Services
Table 77. Huawei In-vehicle Urban Navigation on Autopilot (NOA) Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 78. Huawei Recent Developments/Updates
Table 79. Huawei Competitive Strengths & Weaknesses
Table 80. DEEPROUTE Basic Information, Manufacturing Base and Competitors
Table 81. DEEPROUTE Major Business
Table 82. DEEPROUTE In-vehicle Urban Navigation on Autopilot (NOA) Product and Services
Table 83. DEEPROUTE In-vehicle Urban Navigation on Autopilot (NOA) Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 84. DEEPROUTE Recent Developments/Updates
Table 85. DEEPROUTE Competitive Strengths & Weaknesses
Table 86. Horizon Robotics Basic Information, Manufacturing Base and Competitors
Table 87. Horizon Robotics Major Business
Table 88. Horizon Robotics In-vehicle Urban Navigation on Autopilot (NOA) Product and Services
Table 89. Horizon Robotics In-vehicle Urban Navigation on Autopilot (NOA) Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 90. Horizon Robotics Recent Developments/Updates
Table 91. Horizon Robotics Competitive Strengths & Weaknesses
Table 92. Shenzhen Zhuoyu Technology Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 93. Shenzhen Zhuoyu Technology Co., Ltd. Major Business
Table 94. Shenzhen Zhuoyu Technology Co., Ltd. In-vehicle Urban Navigation on Autopilot (NOA) Product and Services
Table 95. Shenzhen Zhuoyu Technology Co., Ltd. In-vehicle Urban Navigation on Autopilot (NOA) Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 96. Shenzhen Zhuoyu Technology Co., Ltd. Recent Developments/Updates
Table 97. Shenzhen Zhuoyu Technology Co., Ltd. Competitive Strengths & Weaknesses
Table 98. QCraft Basic Information, Manufacturing Base and Competitors
Table 99. QCraft Major Business
Table 100. QCraft In-vehicle Urban Navigation on Autopilot (NOA) Product and Services
Table 101. QCraft In-vehicle Urban Navigation on Autopilot (NOA) Revenue, Gross

Margin and Market Share (2021-2026) & (USD Million)

Table 102. QCraft Recent Developments/Updates

Table 103. QCraft Competitive Strengths & Weaknesses

Table 104. Baidu Apollo Basic Information, Manufacturing Base and Competitors

Table 105. Baidu Apollo Major Business

Table 106. Baidu Apollo In-vehicle Urban Navigation on Autopilot (NOA) Product and Services

Table 107. Baidu Apollo In-vehicle Urban Navigation on Autopilot (NOA) Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 108. Baidu Apollo Recent Developments/Updates

Table 109. Baidu Apollo Competitive Strengths & Weaknesses

Table 110. WeRide Basic Information, Manufacturing Base and Competitors

Table 111. WeRide Major Business

Table 112. WeRide In-vehicle Urban Navigation on Autopilot (NOA) Product and Services

Table 113. WeRide In-vehicle Urban Navigation on Autopilot (NOA) Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 114. WeRide Recent Developments/Updates

Table 115. WeRide Competitive Strengths & Weaknesses

Table 116. Global Key Players of In-vehicle Urban Navigation on Autopilot (NOA) Upstream (Raw Materials)

Table 117. Global In-vehicle Urban Navigation on Autopilot (NOA) Typical Customers

List Of Figures

LIST OF FIGURES

Figure 1. In-vehicle Urban Navigation on Autopilot (NOA) Picture

Figure 2. World In-vehicle Urban Navigation on Autopilot (NOA) Total Revenue: 2021 & 2025 & 2032, (USD Million)

Figure 3. World In-vehicle Urban Navigation on Autopilot (NOA) Total Revenue (2021-2032) & (USD Million)

Figure 4. World In-vehicle Urban Navigation on Autopilot (NOA) Revenue by Region (2021, 2025 and 2032) & (USD Million), (by Headquarter Location)

Figure 5. World In-vehicle Urban Navigation on Autopilot (NOA) Revenue Market Share by Region (2021-2032), (by Headquarter Location)

Figure 6. United States Based Company In-vehicle Urban Navigation on Autopilot (NOA) Revenue (2021-2032) & (USD Million)

Figure 7. China Based Company In-vehicle Urban Navigation on Autopilot (NOA) Revenue (2021-2032) & (USD Million)

Figure 8. Europe Based Company In-vehicle Urban Navigation on Autopilot (NOA) Revenue (2021-2032) & (USD Million)

Figure 9. Japan Based Company In-vehicle Urban Navigation on Autopilot (NOA) Revenue (2021-2032) & (USD Million)

Figure 10. South Korea Based Company In-vehicle Urban Navigation on Autopilot (NOA) Revenue (2021-2032) & (USD Million)

Figure 11. ASEAN Based Company In-vehicle Urban Navigation on Autopilot (NOA) Revenue (2021-2032) & (USD Million)

Figure 12. India Based Company In-vehicle Urban Navigation on Autopilot (NOA) Revenue (2021-2032) & (USD Million)

Figure 13. In-vehicle Urban Navigation on Autopilot (NOA) Market Drivers

Figure 14. Factors Affecting Demand

Figure 15. World In-vehicle Urban Navigation on Autopilot (NOA) Consumption Value (2021-2032) & (USD Million)

Figure 16. World In-vehicle Urban Navigation on Autopilot (NOA) Consumption Value Market Share by Region (2021-2032)

Figure 17. United States In-vehicle Urban Navigation on Autopilot (NOA) Consumption Value (2021-2032) & (USD Million)

Figure 18. China In-vehicle Urban Navigation on Autopilot (NOA) Consumption Value (2021-2032) & (USD Million)

Figure 19. Europe In-vehicle Urban Navigation on Autopilot (NOA) Consumption Value (2021-2032) & (USD Million)

Figure 20. Japan In-vehicle Urban Navigation on Autopilot (NOA) Consumption Value (2021-2032) & (USD Million)

Figure 21. South Korea In-vehicle Urban Navigation on Autopilot (NOA) Consumption Value (2021-2032) & (USD Million)

Figure 22. ASEAN In-vehicle Urban Navigation on Autopilot (NOA) Consumption Value (2021-2032) & (USD Million)

Figure 23. India In-vehicle Urban Navigation on Autopilot (NOA) Consumption Value (2021-2032) & (USD Million)

Figure 24. Producer Shipments of In-vehicle Urban Navigation on Autopilot (NOA) by Player Revenue (\$MM) and Market Share (%): 2025

Figure 25. Global Four-firm Concentration Ratios (CR4) for In-vehicle Urban Navigation on Autopilot (NOA) Markets in 2025

Figure 26. Global Four-firm Concentration Ratios (CR8) for In-vehicle Urban Navigation on Autopilot (NOA) Markets in 2025

Figure 27. United States VS China: In-vehicle Urban Navigation on Autopilot (NOA) Revenue Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: In-vehicle Urban Navigation on Autopilot (NOA) Consumption Value Market Share Comparison (2021 & 2025 & 2032)

Figure 29. World In-vehicle Urban Navigation on Autopilot (NOA) Market Size by Type, (USD Million), 2021 & 2025 & 2032

Figure 30. World In-vehicle Urban Navigation on Autopilot (NOA) Market Size Market Share by Type in 2025

Figure 31. Vision-based Urban NOA

Figure 32. LiDAR-based Urban NOA

Figure 33. Multi-sensor Fusion Urban NOA

Figure 34. World In-vehicle Urban Navigation on Autopilot (NOA) Market Size Market Share by Type (2021-2032)

Figure 35. World In-vehicle Urban Navigation on Autopilot (NOA) Market Size by Development Entity, (USD Million), 2021 & 2025 & 2032

Figure 36. World In-vehicle Urban Navigation on Autopilot (NOA) Market Size Market Share by Development Entity in 2025

Figure 37. OEM Self-developed Urban NOA

Figure 38. Supplier-developed Urban NOA

Figure 39. Joint-development Urban NOA

Figure 40. World In-vehicle Urban Navigation on Autopilot (NOA) Market Size Market Share by Development Entity (2021-2032)

Figure 41. World In-vehicle Urban Navigation on Autopilot (NOA) Market Size by Application, (USD Million), 2021 & 2025 & 2032

Figure 42. World In-vehicle Urban Navigation on Autopilot (NOA) Market Size Market

Share by Application in 2025

Figure 43. Sedan

Figure 44. SUV

Figure 45. Others

Figure 46. World In-vehicle Urban Navigation on Autopilot (NOA) Market Size Market
Share by Application (2021-2032)

Figure 47. In-vehicle Urban Navigation on Autopilot (NOA) Industrial Chain

Figure 48. Methodology

Figure 49. Research Process and Data Source

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