

Global L2-level Highway NOA and L2-level Urban NOA Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global L2-level Highway NOA and L2-level 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).

L2-level Highway NOA and L2-level Urban NOA refer to advanced driver assistance systems that provide navigation-based assisted driving under Level 2 automation. Under this level, the vehicle can assist with both longitudinal and lateral control, such as acceleration, braking, lane keeping, lane centering, following distance control, automatic lane change, ramp entry and exit, traffic-light response, intersection passing, and navigation-guided route execution. However, the system is still not fully autonomous driving. The driver must continuously monitor the driving environment, keep hands or attention ready according to system requirements, and take over immediately when the system requests or when road conditions exceed its operational design domain.

L2-level Highway NOA is mainly used on highways, expressways, and controlled-access roads, where traffic flow is relatively structured and the system focuses on cruising, overtaking, lane changing, and ramp navigation. L2-level Urban NOA is applied to urban roads, including city streets, intersections, traffic lights, roundabouts, unprotected turns, pedestrian crossings, mixed traffic, and complex road markings. Compared with Highway NOA, Urban NOA requires stronger perception, prediction, decision-making, and control capabilities. The main raw materials and key components include automotive-grade chips, AI computing chips, cameras, millimeter-wave radar, ultrasonic radar, lidar in some higher-end solutions, printed circuit boards, connectors, wiring harnesses, optical lenses, electronic control units, domain controllers, memory devices, thermal management materials, and vehicle body electronic components. The industrial chain also includes software algorithms, HD maps or light maps, navigation

data, cloud training platforms, OTA systems, and vehicle control software.

The upstream participants mainly include semiconductor suppliers, sensor manufacturers, automotive electronics companies, map and positioning service providers, and autonomous driving algorithm developers. The midstream includes Tier 1 suppliers, intelligent driving solution providers, domain controller manufacturers, and vehicle integration companies. Downstream customers are mainly passenger car OEMs, especially new energy vehicle manufacturers, premium car brands, emerging EV brands, and traditional automakers upgrading their intelligent driving systems. The technology is mainly used in smart passenger vehicles, with growing application in electric vehicles, hybrid vehicles, and high-end fuel vehicles.

The market for L2-level Highway NOA and L2-level Urban NOA is developing rapidly as intelligent driving becomes a core direction of automotive technology. Highway NOA has entered a relatively mature commercialization stage, while Urban NOA is still in a faster development and expansion phase. The overall market trend is moving from single-scenario assisted driving to multi-scenario navigation-based assisted driving, and from highway-only functions to integrated highway, urban, and parking scenarios. As vehicle electronic architecture becomes more centralized, NOA systems are increasingly integrated with domain controllers, centralized computing platforms, vehicle operating systems, and cloud-based data training systems.

In terms of technology trends, the industry is shifting from HD map-dependent solutions to light-map and map-free solutions. At the same time, perception systems are moving from simple camera or radar-camera fusion toward multi-sensor fusion, while algorithms are evolving from rule-based logic to AI-driven and end-to-end architectures. OTA updates also play an important role, allowing OEMs to continuously improve system performance, expand available cities, and optimize user experience after vehicle delivery. For automakers, L2-level NOA is no longer only a premium feature, but is gradually becoming an important selling point for mid-to-high-end intelligent vehicles.

From a regional perspective, China is one of the most active markets due to strong new energy vehicle penetration, fast product iteration, intense competition among OEMs, and high consumer acceptance of intelligent driving features. North America has strong technological accumulation in software, chips, and autonomous driving development, while Europe places more emphasis on safety validation, compliance, and gradual deployment. Japan and South Korea are also promoting advanced driver assistance functions through established automakers and electronics supply chains. Overall, regional development differs in pace: China focuses on fast commercialization, North

America emphasizes software capability and ecosystem integration, and Europe focuses more on regulation, reliability, and safety.

The main growth drivers include rising consumer demand for smart driving functions, increasing penetration of electric vehicles, continuous upgrades of vehicle electronic and electrical architecture, cost reduction of sensors and computing chips, and rapid improvement in AI perception and decision-making algorithms. In addition, competition among OEMs is pushing NOA functions from optional luxury features toward more mainstream configurations. The expansion of urban NOA also creates stronger demand for high-performance chips, domain controllers, sensors, simulation testing, data annotation, and cloud training. Policy support for intelligent connected vehicles, infrastructure improvement, and stronger collaboration among OEMs, Tier 1 suppliers, chip companies, and software developers are also accelerating market growth. However, the market still faces challenges such as functional safety verification, driver misuse, complex urban edge cases, weather impact, and differences in regulatory approval across regions.

This report studies the global L2-level Highway NOA and L2-level Urban NOA demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for L2-level Highway NOA and L2-level 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 L2-level Highway NOA and L2-level Urban NOA that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global L2-level Highway NOA and L2-level Urban NOA total market, 2021-2032, (USD Million)

Global L2-level Highway NOA and L2-level Urban NOA total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: L2-level Highway NOA and L2-level Urban NOA total market, key domestic companies, and share, (USD Million)

Global L2-level Highway NOA and L2-level Urban NOA revenue by player, revenue and market share 2021-2026, (USD Million)

Global L2-level Highway NOA and L2-level Urban NOA total market by Type, CAGR, 2021-2032, (USD Million)

Global L2-level Highway NOA and L2-level Urban NOA total market by Application,

CAGR, 2021-2032, (USD Million)

This report profiles major players in the global L2-level Highway NOA and L2-level 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 L2-level Highway NOA and L2-level 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 L2-level Highway NOA and L2-level Urban NOA Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global L2-level Highway NOA and L2-level Urban NOA Market, Segmentation by Type:

Highway NOA

Urban NOA

Global L2-level Highway NOA and L2-level Urban NOA Market, Segmentation by Sensor Configuration:

Vision-based NOA

Radar-camera Fusion NOA

LiDAR Fusion NOA

Global L2-level Highway NOA and L2-level 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 L2-level Highway NOA and L2-level Urban NOA market?
2. What is the demand of the global L2-level Highway NOA and L2-level Urban NOA market?
3. What is the year over year growth of the global L2-level Highway NOA and L2-level Urban NOA market?
4. What is the total value of the global L2-level Highway NOA and L2-level Urban NOA market?
5. Who are the Major Players in the global L2-level Highway NOA and L2-level Urban NOA market?
6. What are the growth factors driving the market demand?

Contents

1 SUPPLY SUMMARY

- 1.1 L2-level Highway NOA and L2-level Urban NOA Introduction
- 1.2 World L2-level Highway NOA and L2-level Urban NOA Market Size & Forecast (2021 & 2025 & 2032)
- 1.3 World L2-level Highway NOA and L2-level Urban NOA Total Market by Region (by Headquarter Location)
 - 1.3.1 World L2-level Highway NOA and L2-level Urban NOA Market Size by Region (2021-2032), (by Headquarter Location)
 - 1.3.2 United States Based Company L2-level Highway NOA and L2-level Urban NOA Revenue (2021-2032)
 - 1.3.3 China Based Company L2-level Highway NOA and L2-level Urban NOA Revenue (2021-2032)
 - 1.3.4 Europe Based Company L2-level Highway NOA and L2-level Urban NOA Revenue (2021-2032)
 - 1.3.5 Japan Based Company L2-level Highway NOA and L2-level Urban NOA Revenue (2021-2032)
 - 1.3.6 South Korea Based Company L2-level Highway NOA and L2-level Urban NOA Revenue (2021-2032)
 - 1.3.7 ASEAN Based Company L2-level Highway NOA and L2-level Urban NOA Revenue (2021-2032)
 - 1.3.8 India Based Company L2-level Highway NOA and L2-level Urban NOA Revenue (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
 - 1.4.1 L2-level Highway NOA and L2-level Urban NOA Market Drivers
 - 1.4.2 Factors Affecting Demand
 - 1.4.3 Major Market Trends

2 DEMAND SUMMARY

- 2.1 World L2-level Highway NOA and L2-level Urban NOA Consumption Value (2021-2032)
- 2.2 World L2-level Highway NOA and L2-level Urban NOA Consumption Value by Region
 - 2.2.1 World L2-level Highway NOA and L2-level Urban NOA Consumption Value by Region (2021-2026)
 - 2.2.2 World L2-level Highway NOA and L2-level Urban NOA Consumption Value

Forecast by Region (2027-2032)

2.3 United States L2-level Highway NOA and L2-level Urban NOA Consumption Value (2021-2032)

2.4 China L2-level Highway NOA and L2-level Urban NOA Consumption Value (2021-2032)

2.5 Europe L2-level Highway NOA and L2-level Urban NOA Consumption Value (2021-2032)

2.6 Japan L2-level Highway NOA and L2-level Urban NOA Consumption Value (2021-2032)

2.7 South Korea L2-level Highway NOA and L2-level Urban NOA Consumption Value (2021-2032)

2.8 ASEAN L2-level Highway NOA and L2-level Urban NOA Consumption Value (2021-2032)

2.9 India L2-level Highway NOA and L2-level Urban NOA Consumption Value (2021-2032)

3 WORLD L2-LEVEL HIGHWAY NOA AND L2-LEVEL URBAN NOA COMPANIES COMPETITIVE ANALYSIS

3.1 World L2-level Highway NOA and L2-level Urban NOA Revenue by Player (2021-2026)

3.2 Industry Rank and Concentration Rate (CR)

3.2.1 Global L2-level Highway NOA and L2-level Urban NOA Industry Rank of Major Players

3.2.2 Global Concentration Ratios (CR4) for L2-level Highway NOA and L2-level Urban NOA in 2025

3.2.3 Global Concentration Ratios (CR8) for L2-level Highway NOA and L2-level Urban NOA in 2025

3.3 L2-level Highway NOA and L2-level Urban NOA Company Evaluation Quadrant

3.4 L2-level Highway NOA and L2-level Urban NOA Market: Overall Company Footprint Analysis

3.4.1 L2-level Highway NOA and L2-level Urban NOA Market: Region Footprint

3.4.2 L2-level Highway NOA and L2-level Urban NOA Market: Company Product Type Footprint

3.4.3 L2-level Highway NOA and L2-level Urban 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: L2-level Highway NOA and L2-level Urban NOA Revenue Comparison (by Headquarter Location)

4.1.1 United States VS China: L2-level Highway NOA and L2-level Urban NOA Revenue Comparison (2021 & 2025 & 2032) (by Headquarter Location)

4.1.2 United States VS China: L2-level Highway NOA and L2-level Urban NOA Revenue Market Share Comparison (2021 & 2025 & 2032)

4.2 United States Based Companies VS China Based Companies: L2-level Highway NOA and L2-level Urban NOA Consumption Value Comparison

4.2.1 United States VS China: L2-level Highway NOA and L2-level Urban NOA Consumption Value Comparison (2021 & 2025 & 2032)

4.2.2 United States VS China: L2-level Highway NOA and L2-level Urban NOA Consumption Value Market Share Comparison (2021 & 2025 & 2032)

4.3 United States Based L2-level Highway NOA and L2-level Urban NOA Companies and Market Share, 2021-2026

4.3.1 United States Based L2-level Highway NOA and L2-level Urban NOA Companies, Headquarters (States, Country)

4.3.2 United States Based Companies L2-level Highway NOA and L2-level Urban NOA Revenue, (2021-2026)

4.4 China Based Companies L2-level Highway NOA and L2-level Urban NOA Revenue and Market Share, 2021-2026

4.4.1 China Based L2-level Highway NOA and L2-level Urban NOA Companies, Company Headquarters (Province, Country)

4.4.2 China Based Companies L2-level Highway NOA and L2-level Urban NOA Revenue, (2021-2026)

4.5 Rest of World Based L2-level Highway NOA and L2-level Urban NOA Companies and Market Share, 2021-2026

4.5.1 Rest of World Based L2-level Highway NOA and L2-level Urban NOA Companies, Headquarters (Province, Country)

4.5.2 Rest of World Based Companies L2-level Highway NOA and L2-level Urban NOA Revenue (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World L2-level Highway NOA and L2-level Urban NOA Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 Highway NOA

5.2.2 Urban NOA

5.3 Market Segment by Type

5.3.1 World L2-level Highway NOA and L2-level Urban NOA Market Size by Type (2021-2026)

5.3.2 World L2-level Highway NOA and L2-level Urban NOA Market Size by Type (2027-2032)

5.3.3 World L2-level Highway NOA and L2-level Urban NOA Market Size Market Share by Type (2027-2032)

6 MARKET ANALYSIS BY SENSOR CONFIGURATION

6.1 World L2-level Highway NOA and L2-level Urban NOA Market Size Overview by Sensor Configuration: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Sensor Configuration

6.2.1 Vision-based NOA

6.2.2 Radar-camera Fusion NOA

6.2.3 LiDAR Fusion NOA

6.3 Market Segment by Sensor Configuration

6.3.1 World L2-level Highway NOA and L2-level Urban NOA Market Size by Sensor Configuration (2021-2026)

6.3.2 World L2-level Highway NOA and L2-level Urban NOA Market Size by Sensor Configuration (2027-2032)

6.3.3 World L2-level Highway NOA and L2-level Urban NOA Market Size Market Share by Sensor Configuration (2027-2032)

7 MARKET ANALYSIS BY APPLICATION

7.1 World L2-level Highway NOA and L2-level Urban 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 L2-level Highway NOA and L2-level Urban NOA Market Size by

Application (2021-2026)

7.3.2 World L2-level Highway NOA and L2-level Urban NOA Market Size by

Application (2027-2032)

7.3.3 World L2-level Highway NOA and L2-level Urban 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 L2-level Highway NOA and L2-level Urban NOA Product and Services

8.1.4 Momena L2-level Highway NOA and L2-level Urban 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 L2-level Highway NOA and L2-level Urban NOA Product and Services

8.2.4 Tesla L2-level Highway NOA and L2-level Urban 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 L2-level Highway NOA and L2-level Urban NOA Product and Services

8.3.4 NIO L2-level Highway NOA and L2-level Urban 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 L2-level Highway NOA and L2-level Urban NOA Product and Services

8.4.4 Li Auto L2-level Highway NOA and L2-level Urban 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 L2-level Highway NOA and L2-level Urban NOA Product and Services

8.5.4 XPeng L2-level Highway NOA and L2-level Urban 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 L2-level Highway NOA and L2-level Urban NOA Product and Services

8.6.4 Xiaomi L2-level Highway NOA and L2-level Urban 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 L2-level Highway NOA and L2-level Urban NOA Product and Services

8.7.4 Huawei L2-level Highway NOA and L2-level Urban 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 L2-level Highway NOA and L2-level Urban NOA Product and Services

8.8.4 DEEPROUTE L2-level Highway NOA and L2-level Urban 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 L2-level Highway NOA and L2-level Urban NOA Product and Services

8.9.4 Horizon Robotics L2-level Highway NOA and L2-level Urban 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. L2-level Highway NOA and L2-level Urban NOA Product and Services

8.10.4 Shenzhen Zhuoyu Technology Co., Ltd. L2-level Highway NOA and L2-level Urban 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 L2-level Highway NOA and L2-level Urban NOA Product and Services

8.11.4 QCraft L2-level Highway NOA and L2-level Urban 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 L2-level Highway NOA and L2-level Urban NOA Product and Services

8.12.4 Baidu Apollo L2-level Highway NOA and L2-level Urban 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 L2-level Highway NOA and L2-level Urban NOA Product and Services

8.13.4 WeRide L2-level Highway NOA and L2-level Urban NOA Revenue, Gross Margin and Market Share (2021-2026)

8.13.5 WeRide Recent Developments/Updates

8.13.6 WeRide Competitive Strengths & Weaknesses

8.14 Motovis

- 8.14.1 Motovis Details
- 8.14.2 Motovis Major Business
- 8.14.3 Motovis L2-level Highway NOA and L2-level Urban NOA Product and Services
- 8.14.4 Motovis L2-level Highway NOA and L2-level Urban NOA Revenue, Gross Margin and Market Share (2021-2026)
- 8.14.5 Motovis Recent Developments/Updates
- 8.14.6 Motovis Competitive Strengths & Weaknesses

9 INDUSTRY CHAIN ANALYSIS

- 9.1 L2-level Highway NOA and L2-level Urban NOA Industry Chain
- 9.2 L2-level Highway NOA and L2-level Urban NOA Upstream Analysis
- 9.3 L2-level Highway NOA and L2-level Urban NOA Midstream Analysis
- 9.4 L2-level Highway NOA and L2-level Urban 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 L2-level Highway NOA and L2-level Urban NOA Revenue by Region (2021, 2025 and 2032) & (USD Million), (by Headquarter Location)

Table 2. World L2-level Highway NOA and L2-level Urban NOA Revenue by Region (2021-2026) & (USD Million), (by Headquarter Location)

Table 3. World L2-level Highway NOA and L2-level Urban NOA Revenue by Region (2027-2032) & (USD Million), (by Headquarter Location)

Table 4. World L2-level Highway NOA and L2-level Urban NOA Revenue Market Share by Region (2021-2026), (by Headquarter Location)

Table 5. World L2-level Highway NOA and L2-level Urban NOA Revenue Market Share by Region (2027-2032), (by Headquarter Location)

Table 6. Major Market Trends

Table 7. World L2-level Highway NOA and L2-level Urban NOA Consumption Value Growth Rate Forecast by Region (2021 & 2025 & 2032) & (USD Million)

Table 8. World L2-level Highway NOA and L2-level Urban NOA Consumption Value by Region (2021-2026) & (USD Million)

Table 9. World L2-level Highway NOA and L2-level Urban NOA Consumption Value Forecast by Region (2027-2032) & (USD Million)

Table 10. World L2-level Highway NOA and L2-level Urban NOA Revenue by Player (2021-2026) & (USD Million)

Table 11. Revenue Market Share of Key L2-level Highway NOA and L2-level Urban NOA Players in 2025

Table 12. World L2-level Highway NOA and L2-level Urban NOA Industry Rank of Major Player, Based on Revenue in 2025

Table 13. Global L2-level Highway NOA and L2-level Urban NOA Company Evaluation Quadrant

Table 14. Head Office of Key L2-level Highway NOA and L2-level Urban NOA Players

Table 15. L2-level Highway NOA and L2-level Urban NOA Market: Company Product Type Footprint

Table 16. L2-level Highway NOA and L2-level Urban NOA Market: Company Product Application Footprint

Table 17. L2-level Highway NOA and L2-level Urban NOA Mergers & Acquisitions Activity

Table 18. United States VS China L2-level Highway NOA and L2-level Urban NOA Revenue Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 19. United States VS China L2-level Highway NOA and L2-level Urban NOA

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

Table 20. United States Based L2-level Highway NOA and L2-level Urban NOA Companies, Headquarters (States, Country)

Table 21. United States Based Companies L2-level Highway NOA and L2-level Urban NOA Revenue, (2021-2026) & (USD Million)

Table 22. United States Based Companies L2-level Highway NOA and L2-level Urban NOA Revenue Market Share (2021-2026)

Table 23. China Based L2-level Highway NOA and L2-level Urban NOA Companies, Headquarters (Province, Country)

Table 24. China Based Companies L2-level Highway NOA and L2-level Urban NOA Revenue, (2021-2026) & (USD Million)

Table 25. China Based Companies L2-level Highway NOA and L2-level Urban NOA Revenue Market Share (2021-2026)

Table 26. Rest of World Based L2-level Highway NOA and L2-level Urban NOA Companies, Headquarters (Province, Country)

Table 27. Rest of World Based Companies L2-level Highway NOA and L2-level Urban NOA Revenue (2021-2026) & (USD Million)

Table 28. Rest of World Based Companies L2-level Highway NOA and L2-level Urban NOA Revenue Market Share (2021-2026)

Table 29. World L2-level Highway NOA and L2-level Urban NOA Market Size by Type, (USD Million), 2021 & 2025 & 2032

Table 30. World L2-level Highway NOA and L2-level Urban NOA Market Size Value by Type (2021-2026) & (USD Million)

Table 31. World L2-level Highway NOA and L2-level Urban NOA Market Size by Type (2027-2032) & (USD Million)

Table 32. World L2-level Highway NOA and L2-level Urban NOA Market Size by Sensor Configuration, (USD Million), 2021 & 2025 & 2032

Table 33. World L2-level Highway NOA and L2-level Urban NOA Market Size Value by Sensor Configuration (2021-2026) & (USD Million)

Table 34. World L2-level Highway NOA and L2-level Urban NOA Market Size by Sensor Configuration (2027-2032) & (USD Million)

Table 35. World L2-level Highway NOA and L2-level Urban NOA Market Size by Application, (USD Million), 2021 & 2025 & 2032

Table 36. World L2-level Highway NOA and L2-level Urban NOA Market Size by Application (2021-2026) & (USD Million)

Table 37. World L2-level Highway NOA and L2-level Urban NOA Market Size by Application (2027-2032) & (USD Million)

Table 38. Momenta Basic Information, Manufacturing Base and Competitors

Table 39. Momenta Major Business

Table 40. Momenta L2-level Highway NOA and L2-level Urban NOA Product and Services

Table 41. Momenta L2-level Highway NOA and L2-level Urban 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 L2-level Highway NOA and L2-level Urban NOA Product and Services

Table 47. Tesla L2-level Highway NOA and L2-level Urban 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 L2-level Highway NOA and L2-level Urban NOA Product and Services

Table 53. NIO L2-level Highway NOA and L2-level Urban 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 L2-level Highway NOA and L2-level Urban NOA Product and Services

Table 59. Li Auto L2-level Highway NOA and L2-level Urban 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 L2-level Highway NOA and L2-level Urban NOA Product and Services

Table 65. XPeng L2-level Highway NOA and L2-level Urban 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 L2-level Highway NOA and L2-level Urban NOA Product and Services

Table 71. Xiaomi L2-level Highway NOA and L2-level Urban 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 L2-level Highway NOA and L2-level Urban NOA Product and Services
Table 77. Huawei L2-level Highway NOA and L2-level Urban 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 L2-level Highway NOA and L2-level Urban NOA Product and Services
Table 83. DEEPROUTE L2-level Highway NOA and L2-level Urban 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 L2-level Highway NOA and L2-level Urban NOA Product and Services
Table 89. Horizon Robotics L2-level Highway NOA and L2-level Urban 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. L2-level Highway NOA and L2-level Urban NOA Product and Services
Table 95. Shenzhen Zhuoyu Technology Co., Ltd. L2-level Highway NOA and L2-level Urban 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 L2-level Highway NOA and L2-level Urban NOA Product and

Services

Table 101. QCraft L2-level Highway NOA and L2-level Urban 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 L2-level Highway NOA and L2-level Urban NOA Product and Services

Table 107. Baidu Apollo L2-level Highway NOA and L2-level Urban 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 L2-level Highway NOA and L2-level Urban NOA Product and Services

Table 113. WeRide L2-level Highway NOA and L2-level Urban 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. Motovis Basic Information, Manufacturing Base and Competitors

Table 117. Motovis Major Business

Table 118. Motovis L2-level Highway NOA and L2-level Urban NOA Product and Services

Table 119. Motovis L2-level Highway NOA and L2-level Urban NOA Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 120. Motovis Recent Developments/Updates

Table 121. Motovis Competitive Strengths & Weaknesses

Table 122. Global Key Players of L2-level Highway NOA and L2-level Urban NOA Upstream (Raw Materials)

Table 123. Global L2-level Highway NOA and L2-level Urban NOA Typical Customers

List Of Figures

LIST OF FIGURES

- Figure 1. L2-level Highway NOA and L2-level Urban NOA Picture
- Figure 2. World L2-level Highway NOA and L2-level Urban NOA Total Revenue: 2021 & 2025 & 2032, (USD Million)
- Figure 3. World L2-level Highway NOA and L2-level Urban NOA Total Revenue (2021-2032) & (USD Million)
- Figure 4. World L2-level Highway NOA and L2-level Urban NOA Revenue by Region (2021, 2025 and 2032) & (USD Million), (by Headquarter Location)
- Figure 5. World L2-level Highway NOA and L2-level Urban NOA Revenue Market Share by Region (2021-2032), (by Headquarter Location)
- Figure 6. United States Based Company L2-level Highway NOA and L2-level Urban NOA Revenue (2021-2032) & (USD Million)
- Figure 7. China Based Company L2-level Highway NOA and L2-level Urban NOA Revenue (2021-2032) & (USD Million)
- Figure 8. Europe Based Company L2-level Highway NOA and L2-level Urban NOA Revenue (2021-2032) & (USD Million)
- Figure 9. Japan Based Company L2-level Highway NOA and L2-level Urban NOA Revenue (2021-2032) & (USD Million)
- Figure 10. South Korea Based Company L2-level Highway NOA and L2-level Urban NOA Revenue (2021-2032) & (USD Million)
- Figure 11. ASEAN Based Company L2-level Highway NOA and L2-level Urban NOA Revenue (2021-2032) & (USD Million)
- Figure 12. India Based Company L2-level Highway NOA and L2-level Urban NOA Revenue (2021-2032) & (USD Million)
- Figure 13. L2-level Highway NOA and L2-level Urban NOA Market Drivers
- Figure 14. Factors Affecting Demand
- Figure 15. World L2-level Highway NOA and L2-level Urban NOA Consumption Value (2021-2032) & (USD Million)
- Figure 16. World L2-level Highway NOA and L2-level Urban NOA Consumption Value Market Share by Region (2021-2032)
- Figure 17. United States L2-level Highway NOA and L2-level Urban NOA Consumption Value (2021-2032) & (USD Million)
- Figure 18. China L2-level Highway NOA and L2-level Urban NOA Consumption Value (2021-2032) & (USD Million)
- Figure 19. Europe L2-level Highway NOA and L2-level Urban NOA Consumption Value (2021-2032) & (USD Million)

Figure 20. Japan L2-level Highway NOA and L2-level Urban NOA Consumption Value (2021-2032) & (USD Million)

Figure 21. South Korea L2-level Highway NOA and L2-level Urban NOA Consumption Value (2021-2032) & (USD Million)

Figure 22. ASEAN L2-level Highway NOA and L2-level Urban NOA Consumption Value (2021-2032) & (USD Million)

Figure 23. India L2-level Highway NOA and L2-level Urban NOA Consumption Value (2021-2032) & (USD Million)

Figure 24. Producer Shipments of L2-level Highway NOA and L2-level Urban NOA by Player Revenue (\$MM) and Market Share (%): 2025

Figure 25. Global Four-firm Concentration Ratios (CR4) for L2-level Highway NOA and L2-level Urban NOA Markets in 2025

Figure 26. Global Four-firm Concentration Ratios (CR8) for L2-level Highway NOA and L2-level Urban NOA Markets in 2025

Figure 27. United States VS China: L2-level Highway NOA and L2-level Urban NOA Revenue Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: L2-level Highway NOA and L2-level Urban NOA Consumption Value Market Share Comparison (2021 & 2025 & 2032)

Figure 29. World L2-level Highway NOA and L2-level Urban NOA Market Size by Type, (USD Million), 2021 & 2025 & 2032

Figure 30. World L2-level Highway NOA and L2-level Urban NOA Market Size Market Share by Type in 2025

Figure 31. Highway NOA

Figure 32. Urban NOA

Figure 33. World L2-level Highway NOA and L2-level Urban NOA Market Size Market Share by Type (2021-2032)

Figure 34. World L2-level Highway NOA and L2-level Urban NOA Market Size by Sensor Configuration, (USD Million), 2021 & 2025 & 2032

Figure 35. World L2-level Highway NOA and L2-level Urban NOA Market Size Market Share by Sensor Configuration in 2025

Figure 36. Vision-based NOA

Figure 37. Radar-camera Fusion NOA

Figure 38. LiDAR Fusion NOA

Figure 39. World L2-level Highway NOA and L2-level Urban NOA Market Size Market Share by Sensor Configuration (2021-2032)

Figure 40. World L2-level Highway NOA and L2-level Urban NOA Market Size by Application, (USD Million), 2021 & 2025 & 2032

Figure 41. World L2-level Highway NOA and L2-level Urban NOA Market Size Market Share by Application in 2025

Figure 42. Sedan

Figure 43. SUV

Figure 44. Others

Figure 45. World L2-level Highway NOA and L2-level Urban NOA Market Size Market Share by Application (2021-2032)

Figure 46. L2-level Highway NOA and L2-level Urban NOA Industrial Chain

Figure 47. Methodology

Figure 48. Research Process and Data Source

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