

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

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Abstracts

The global Urban NOA Assisted Driving 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).

Urban NOA Assisted Driving refers to an L2-level advanced driver assistance function designed for urban road environments. NOA usually means Navigation on Autopilot or Navigate on Autopilot, and in urban scenarios it enables the vehicle to follow a navigation route and assist with steering, acceleration, braking, lane keeping, lane changes, traffic light response, intersection passing, obstacle avoidance and merging in complex city traffic. It is still an assisted driving function rather than fully autonomous driving, so the driver must remain responsible for monitoring the road and taking over when necessary. Compared with highway NOA, Urban NOA faces more complex conditions, including pedestrians, bicycles, electric scooters, parked vehicles, traffic lights, roundabouts, unprotected turns and irregular road markings.

The upstream of Urban NOA Assisted Driving mainly includes cameras, millimeter-wave radar, ultrasonic radar, LiDAR in some configurations, driving domain controllers, AI chips, memory chips, PCBs, connectors, wiring harnesses, sensors, map data, simulation platforms, operating systems and algorithm software. The midstream participants are automakers, intelligent driving solution providers, chip companies, sensor suppliers and software developers. Downstream customers are mainly passenger car OEMs, new energy vehicle brands, smart vehicle platforms, Robotaxi operators and mobility fleet operators. The technology is mainly installed in smart passenger cars and electric vehicles, especially mid- to high-end models and models positioned around intelligent driving experience.

The Urban NOA Assisted Driving market is developing rapidly as intelligent vehicles shift from basic L2 functions to higher-level navigation-based assisted driving. The industry trend is moving from highway NOA to urban NOA, and from limited mapped areas to wider city coverage. Automakers are increasingly using urban NOA as a key selling point for smart electric vehicles, while suppliers are promoting more standardized and scalable solutions. Another important trend is the transition from HD map-dependent solutions to light-map and map-free solutions, because automakers want faster city expansion, lower operating costs and better adaptability to changing road conditions.

In terms of technology, the market is moving toward stronger perception, higher computing power and more end-to-end algorithm architecture. Vision-based solutions are becoming more important due to cost advantages, while LiDAR-based and multi-sensor fusion solutions are still used in many mid- to high-end models to improve safety redundancy and perception reliability. AI foundation models, data-driven training, vehicle-cloud collaboration, simulation testing and OTA software updates are becoming key factors in product competitiveness. As hardware cost declines, Urban NOA is gradually moving from premium vehicles to mass-market models.

Regionally, China is one of the most active markets, supported by strong new energy vehicle penetration, intense competition among smart EV brands and rapid commercialization by local intelligent driving suppliers. North America is led by large technology-oriented automakers and software-defined vehicle platforms, while Europe is relatively more cautious due to stricter regulation, safety validation requirements and conservative deployment strategies. Other regions are still in earlier stages, with demand mainly concentrated in premium electric vehicles and selected smart mobility applications.

The main growth drivers include rising consumer demand for intelligent driving experience, strong competition among EV brands, rapid improvement in AI algorithms, falling sensor and computing hardware costs, and the expansion of software-defined vehicle architecture. In addition, automakers use Urban NOA to improve vehicle differentiation and brand value, while suppliers benefit from the increasing outsourcing demand from OEMs that do not have full-stack self-development capabilities. The growth of electric vehicles also supports adoption, because EV platforms are easier to integrate domain controllers, high-voltage electronic architecture and OTA upgrade systems. However, the market still faces constraints such as high validation difficulty, safety responsibility issues, regulatory uncertainty, complex urban traffic conditions and consumer trust challenges. Overall, Urban NOA Assisted Driving is expected to remain

one of the most important development directions in the intelligent vehicle industry.

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

This report is a detailed and comprehensive analysis of the world market for Urban NOA Assisted Driving, 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 Urban NOA Assisted Driving that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Urban NOA Assisted Driving total market, 2021-2032, (USD Million)

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

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

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

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

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

This report profiles major players in the global Urban NOA Assisted Driving 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 Urban NOA Assisted Driving 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 Urban NOA Assisted Driving Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Urban NOA Assisted Driving Market, Segmentation by Type:

Vision-based Urban NOA

LiDAR-based Urban NOA

Multi-sensor Fusion Urban NOA

Global Urban NOA Assisted Driving Market, Segmentation by Development Entity:

OEM Self-developed Urban NOA

Supplier-developed Urban NOA

Joint-development Urban NOA

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

Contents

1 SUPPLY SUMMARY

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

2 DEMAND SUMMARY

- 2.1 World Urban NOA Assisted Driving Consumption Value (2021-2032)
- 2.2 World Urban NOA Assisted Driving Consumption Value by Region
 - 2.2.1 World Urban NOA Assisted Driving Consumption Value by Region (2021-2026)
 - 2.2.2 World Urban NOA Assisted Driving Consumption Value Forecast by Region (2027-2032)
- 2.3 United States Urban NOA Assisted Driving Consumption Value (2021-2032)
- 2.4 China Urban NOA Assisted Driving Consumption Value (2021-2032)
- 2.5 Europe Urban NOA Assisted Driving Consumption Value (2021-2032)
- 2.6 Japan Urban NOA Assisted Driving Consumption Value (2021-2032)
- 2.7 South Korea Urban NOA Assisted Driving Consumption Value (2021-2032)
- 2.8 ASEAN Urban NOA Assisted Driving Consumption Value (2021-2032)
- 2.9 India Urban NOA Assisted Driving Consumption Value (2021-2032)

3 WORLD URBAN NOA ASSISTED DRIVING COMPANIES COMPETITIVE ANALYSIS

- 3.1 World Urban NOA Assisted Driving Revenue by Player (2021-2026)
- 3.2 Industry Rank and Concentration Rate (CR)
 - 3.2.1 Global Urban NOA Assisted Driving Industry Rank of Major Players
 - 3.2.2 Global Concentration Ratios (CR4) for Urban NOA Assisted Driving in 2025
 - 3.2.3 Global Concentration Ratios (CR8) for Urban NOA Assisted Driving in 2025
- 3.3 Urban NOA Assisted Driving Company Evaluation Quadrant
- 3.4 Urban NOA Assisted Driving Market: Overall Company Footprint Analysis
 - 3.4.1 Urban NOA Assisted Driving Market: Region Footprint
 - 3.4.2 Urban NOA Assisted Driving Market: Company Product Type Footprint
 - 3.4.3 Urban NOA Assisted Driving 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: Urban NOA Assisted Driving Revenue Comparison (by Headquarter Location)
 - 4.1.1 United States VS China: Urban NOA Assisted Driving Revenue Comparison (2021 & 2025 & 2032) (by Headquarter Location)
 - 4.1.2 United States VS China: Urban NOA Assisted Driving Revenue Market Share Comparison (2021 & 2025 & 2032)
- 4.2 United States Based Companies VS China Based Companies: Urban NOA Assisted Driving Consumption Value Comparison
 - 4.2.1 United States VS China: Urban NOA Assisted Driving Consumption Value Comparison (2021 & 2025 & 2032)
 - 4.2.2 United States VS China: Urban NOA Assisted Driving Consumption Value Market Share Comparison (2021 & 2025 & 2032)
- 4.3 United States Based Urban NOA Assisted Driving Companies and Market Share, 2021-2026
 - 4.3.1 United States Based Urban NOA Assisted Driving Companies, Headquarters (States, Country)
 - 4.3.2 United States Based Companies Urban NOA Assisted Driving Revenue,

(2021-2026)

4.4 China Based Companies Urban NOA Assisted Driving Revenue and Market Share, 2021-2026

4.4.1 China Based Urban NOA Assisted Driving Companies, Company Headquarters (Province, Country)

4.4.2 China Based Companies Urban NOA Assisted Driving Revenue, (2021-2026)

4.5 Rest of World Based Urban NOA Assisted Driving Companies and Market Share, 2021-2026

4.5.1 Rest of World Based Urban NOA Assisted Driving Companies, Headquarters (Province, Country)

4.5.2 Rest of World Based Companies Urban NOA Assisted Driving Revenue (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Urban NOA Assisted Driving 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 Urban NOA Assisted Driving Market Size by Type (2021-2026)

5.3.2 World Urban NOA Assisted Driving Market Size by Type (2027-2032)

5.3.3 World Urban NOA Assisted Driving Market Size Market Share by Type (2027-2032)

6 MARKET ANALYSIS BY DEVELOPMENT ENTITY

6.1 World Urban NOA Assisted Driving 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 Urban NOA Assisted Driving Market Size by Development Entity (2021-2026)

6.3.2 World Urban NOA Assisted Driving Market Size by Development Entity

(2027-2032)

6.3.3 World Urban NOA Assisted Driving Market Size Market Share by Development Entity (2027-2032)

7 MARKET ANALYSIS BY APPLICATION

7.1 World Urban NOA Assisted Driving 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 Urban NOA Assisted Driving Market Size by Application (2021-2026)

7.3.2 World Urban NOA Assisted Driving Market Size by Application (2027-2032)

7.3.3 World Urban NOA Assisted Driving 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 Urban NOA Assisted Driving Product and Services

8.1.4 Momena Urban NOA Assisted Driving 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 Urban NOA Assisted Driving Product and Services

8.2.4 Tesla Urban NOA Assisted Driving 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 Urban NOA Assisted Driving Product and Services
- 8.3.4 NIO Urban NOA Assisted Driving 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 Urban NOA Assisted Driving Product and Services
 - 8.4.4 Li Auto Urban NOA Assisted Driving 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 Urban NOA Assisted Driving Product and Services
 - 8.5.4 XPeng Urban NOA Assisted Driving 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 Urban NOA Assisted Driving Product and Services
 - 8.6.4 Xiaomi Urban NOA Assisted Driving 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 Urban NOA Assisted Driving Product and Services
 - 8.7.4 Huawei Urban NOA Assisted Driving 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 Urban NOA Assisted Driving Product and Services
- 8.8.4 DEEPROUTE Urban NOA Assisted Driving 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 Urban NOA Assisted Driving Product and Services
 - 8.9.4 Horizon Robotics Urban NOA Assisted Driving 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. Urban NOA Assisted Driving Product and Services
 - 8.10.4 Shenzhen Zhuoyu Technology Co., Ltd. Urban NOA Assisted Driving 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 Urban NOA Assisted Driving Product and Services
 - 8.11.4 QCraft Urban NOA Assisted Driving 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 Urban NOA Assisted Driving Product and Services
 - 8.12.4 Baidu Apollo Urban NOA Assisted Driving 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 Urban NOA Assisted Driving Product and Services

8.13.4 WeRide Urban NOA Assisted Driving 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 Urban NOA Assisted Driving Industry Chain

9.2 Urban NOA Assisted Driving Upstream Analysis

9.3 Urban NOA Assisted Driving Midstream Analysis

9.4 Urban NOA Assisted Driving 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 Urban NOA Assisted Driving Revenue by Region (2021, 2025 and 2032) & (USD Million), (by Headquarter Location)

Table 2. World Urban NOA Assisted Driving Revenue by Region (2021-2026) & (USD Million), (by Headquarter Location)

Table 3. World Urban NOA Assisted Driving Revenue by Region (2027-2032) & (USD Million), (by Headquarter Location)

Table 4. World Urban NOA Assisted Driving Revenue Market Share by Region (2021-2026), (by Headquarter Location)

Table 5. World Urban NOA Assisted Driving Revenue Market Share by Region (2027-2032), (by Headquarter Location)

Table 6. Major Market Trends

Table 7. World Urban NOA Assisted Driving Consumption Value Growth Rate Forecast by Region (2021 & 2025 & 2032) & (USD Million)

Table 8. World Urban NOA Assisted Driving Consumption Value by Region (2021-2026) & (USD Million)

Table 9. World Urban NOA Assisted Driving Consumption Value Forecast by Region (2027-2032) & (USD Million)

Table 10. World Urban NOA Assisted Driving Revenue by Player (2021-2026) & (USD Million)

Table 11. Revenue Market Share of Key Urban NOA Assisted Driving Players in 2025

Table 12. World Urban NOA Assisted Driving Industry Rank of Major Player, Based on Revenue in 2025

Table 13. Global Urban NOA Assisted Driving Company Evaluation Quadrant

Table 14. Head Office of Key Urban NOA Assisted Driving Players

Table 15. Urban NOA Assisted Driving Market: Company Product Type Footprint

Table 16. Urban NOA Assisted Driving Market: Company Product Application Footprint

Table 17. Urban NOA Assisted Driving Mergers & Acquisitions Activity

Table 18. United States VS China Urban NOA Assisted Driving Revenue Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 19. United States VS China Urban NOA Assisted Driving Consumption Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 20. United States Based Urban NOA Assisted Driving Companies, Headquarters (States, Country)

Table 21. United States Based Companies Urban NOA Assisted Driving Revenue, (2021-2026) & (USD Million)

Table 22. United States Based Companies Urban NOA Assisted Driving Revenue Market Share (2021-2026)

Table 23. China Based Urban NOA Assisted Driving Companies, Headquarters (Province, Country)

Table 24. China Based Companies Urban NOA Assisted Driving Revenue, (2021-2026) & (USD Million)

Table 25. China Based Companies Urban NOA Assisted Driving Revenue Market Share (2021-2026)

Table 26. Rest of World Based Urban NOA Assisted Driving Companies, Headquarters (Province, Country)

Table 27. Rest of World Based Companies Urban NOA Assisted Driving Revenue (2021-2026) & (USD Million)

Table 28. Rest of World Based Companies Urban NOA Assisted Driving Revenue Market Share (2021-2026)

Table 29. World Urban NOA Assisted Driving Market Size by Type, (USD Million), 2021 & 2025 & 2032

Table 30. World Urban NOA Assisted Driving Market Size Value by Type (2021-2026) & (USD Million)

Table 31. World Urban NOA Assisted Driving Market Size by Type (2027-2032) & (USD Million)

Table 32. World Urban NOA Assisted Driving Market Size by Development Entity, (USD Million), 2021 & 2025 & 2032

Table 33. World Urban NOA Assisted Driving Market Size Value by Development Entity (2021-2026) & (USD Million)

Table 34. World Urban NOA Assisted Driving Market Size by Development Entity (2027-2032) & (USD Million)

Table 35. World Urban NOA Assisted Driving Market Size by Application, (USD Million), 2021 & 2025 & 2032

Table 36. World Urban NOA Assisted Driving Market Size by Application (2021-2026) & (USD Million)

Table 37. World Urban NOA Assisted Driving 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 Urban NOA Assisted Driving Product and Services

Table 41. Momenta Urban NOA Assisted Driving 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 Urban NOA Assisted Driving Product and Services
Table 47. Tesla Urban NOA Assisted Driving 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 Urban NOA Assisted Driving Product and Services
Table 53. NIO Urban NOA Assisted Driving 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 Urban NOA Assisted Driving Product and Services
Table 59. Li Auto Urban NOA Assisted Driving 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 Urban NOA Assisted Driving Product and Services
Table 65. XPeng Urban NOA Assisted Driving 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 Urban NOA Assisted Driving Product and Services
Table 71. Xiaomi Urban NOA Assisted Driving 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 Urban NOA Assisted Driving Product and Services
Table 77. Huawei Urban NOA Assisted Driving 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 Urban NOA Assisted Driving Product and Services

Table 83. DEEPROUTE Urban NOA Assisted Driving 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 Urban NOA Assisted Driving Product and Services

Table 89. Horizon Robotics Urban NOA Assisted Driving 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. Urban NOA Assisted Driving Product and Services

Table 95. Shenzhen Zhuoyu Technology Co., Ltd. Urban NOA Assisted Driving 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 Urban NOA Assisted Driving Product and Services

Table 101. QCraft Urban NOA Assisted Driving 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 Urban NOA Assisted Driving Product and Services

Table 107. Baidu Apollo Urban NOA Assisted Driving 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 Urban NOA Assisted Driving Product and Services

Table 113. WeRide Urban NOA Assisted Driving 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 Urban NOA Assisted Driving Upstream (Raw Materials)

Table 117. Global Urban NOA Assisted Driving Typical Customers

List Of Figures

LIST OF FIGURES

Figure 1. Urban NOA Assisted Driving Picture

Figure 2. World Urban NOA Assisted Driving Total Revenue: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Urban NOA Assisted Driving Total Revenue (2021-2032) & (USD Million)

Figure 4. World Urban NOA Assisted Driving Revenue by Region (2021, 2025 and 2032) & (USD Million), (by Headquarter Location)

Figure 5. World Urban NOA Assisted Driving Revenue Market Share by Region (2021-2032), (by Headquarter Location)

Figure 6. United States Based Company Urban NOA Assisted Driving Revenue (2021-2032) & (USD Million)

Figure 7. China Based Company Urban NOA Assisted Driving Revenue (2021-2032) & (USD Million)

Figure 8. Europe Based Company Urban NOA Assisted Driving Revenue (2021-2032) & (USD Million)

Figure 9. Japan Based Company Urban NOA Assisted Driving Revenue (2021-2032) & (USD Million)

Figure 10. South Korea Based Company Urban NOA Assisted Driving Revenue (2021-2032) & (USD Million)

Figure 11. ASEAN Based Company Urban NOA Assisted Driving Revenue (2021-2032) & (USD Million)

Figure 12. India Based Company Urban NOA Assisted Driving Revenue (2021-2032) & (USD Million)

Figure 13. Urban NOA Assisted Driving Market Drivers

Figure 14. Factors Affecting Demand

Figure 15. World Urban NOA Assisted Driving Consumption Value (2021-2032) & (USD Million)

Figure 16. World Urban NOA Assisted Driving Consumption Value Market Share by Region (2021-2032)

Figure 17. United States Urban NOA Assisted Driving Consumption Value (2021-2032) & (USD Million)

Figure 18. China Urban NOA Assisted Driving Consumption Value (2021-2032) & (USD Million)

Figure 19. Europe Urban NOA Assisted Driving Consumption Value (2021-2032) & (USD Million)

Figure 20. Japan Urban NOA Assisted Driving Consumption Value (2021-2032) & (USD Million)

Figure 21. South Korea Urban NOA Assisted Driving Consumption Value (2021-2032) & (USD Million)

Figure 22. ASEAN Urban NOA Assisted Driving Consumption Value (2021-2032) & (USD Million)

Figure 23. India Urban NOA Assisted Driving Consumption Value (2021-2032) & (USD Million)

Figure 24. Producer Shipments of Urban NOA Assisted Driving by Player Revenue (\$MM) and Market Share (%): 2025

Figure 25. Global Four-firm Concentration Ratios (CR4) for Urban NOA Assisted Driving Markets in 2025

Figure 26. Global Four-firm Concentration Ratios (CR8) for Urban NOA Assisted Driving Markets in 2025

Figure 27. United States VS China: Urban NOA Assisted Driving Revenue Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: Urban NOA Assisted Driving Consumption Value Market Share Comparison (2021 & 2025 & 2032)

Figure 29. World Urban NOA Assisted Driving Market Size by Type, (USD Million), 2021 & 2025 & 2032

Figure 30. World Urban NOA Assisted Driving 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 Urban NOA Assisted Driving Market Size Market Share by Type (2021-2032)

Figure 35. World Urban NOA Assisted Driving Market Size by Development Entity, (USD Million), 2021 & 2025 & 2032

Figure 36. World Urban NOA Assisted Driving 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 Urban NOA Assisted Driving Market Size Market Share by Development Entity (2021-2032)

Figure 41. World Urban NOA Assisted Driving Market Size by Application, (USD Million), 2021 & 2025 & 2032

Figure 42. World Urban NOA Assisted Driving Market Size Market Share by Application

in 2025

Figure 43. Sedan

Figure 44. SUV

Figure 45. Others

Figure 46. World Urban NOA Assisted Driving Market Size Market Share by Application (2021-2032)

Figure 47. Urban NOA Assisted Driving Industrial Chain

Figure 48. Methodology

Figure 49. Research Process and Data Source

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