

Global End-to-end L2 Urban Assisted Driving System Market Growth (Status and Outlook) 2026-2032

<https://marketpublishers.com/r/G214BDAA5DD1EN.html>

Date: January 2026

Pages: 127

Price: US\$ 3,660.00 (Single User License)

ID: G214BDAA5DD1EN

Abstracts

The global End-to-end L2 Urban Assisted Driving System market size is predicted to grow from US\$ 3017 million in 2025 to US\$ 31386 million in 2032; it is expected to grow at a CAGR of 36.1% from 2026 to 2032.

In 2025, the global End-to-end L2 Urban Assisted Driving System (ADAS) market was in its early stages of commercialization, with gross margins ranging from 3.26% to 87.13% depending on company R&D progress and commercialization level. An end-to-end ADAS system refers to an intelligent driving architecture where a data-driven unified deep learning model (or a set of tightly coupled small models) directly maps multi-sensor inputs (cameras, radar, lidar (if applicable), localization, and vehicle status) to executable driving outputs, including intent, target trajectory, and steering/throttle/braking control, with minimal human rules and interfaces. This capability is continuously improved through a closed-loop process of data collection, training, evaluation, and deployment, enabling strategies to generalize to complex traffic conditions and long-tail scenarios. In practice, two main technological forms are typically used. Modular E2E employs neural networks for perception and decision-making/planning while retaining human-designed interfaces (e.g., object lists, occupancy grids, pure electric vehicle functionality) to support engineering decomposition, phased validation, and faster production. A unified (integrated) end-to-end (E2E) approach further integrates perception, prediction, and planning (sometimes including partial control) into a single policy network/large model, and performs joint optimization for the ultimate driving task objective, thereby reducing information loss and error accumulation caused by interfaces. An end-to-end L2 urban assisted driving system refers to a system operating within a limited design domain of complex traffic environments such as urban roads for passenger vehicles. The system uses a data-driven end-to-end model (a single model or a few tightly coupled models) as its core,

processing multi-source sensor and vehicle state inputs (which may include cameras, millimeter-wave radar, lidar, positioning/IMU, vehicle signals, etc.) with minimal manual rules and explicit intermediate interfaces. It directly outputs the driving decisions and executable trajectories/control quantities (e.g., target trajectory, steering/acceleration/deceleration commands) required for urban traffic. It achieves automotive-grade delivery through mass-production-level safety constraints, driver monitoring (DMS), ODD boundary management, fault diagnosis and degradation strategies, and simulation and regression verification systems. Its automation level is still SAE Level 2: the system can control both lateral and longitudinal directions at the same time, but the driver must continuously supervise and be ready to take over at any time. The system's capabilities are continuously iterated through OTA and data closed loop to improve cross-city generalization, long-tail scenario processing and availability consistency.

The commercialization of end-to-end L2 urban assisted driving systems essentially occurs within the 'automotive-grade high-level assisted driving' sector. While still constrained by the responsibility boundaries of Level 2 and the requirement for continuous driver supervision, the direct value of replacing or significantly reducing manual rules and interfaces in the traditional modular stack with a stronger data-driven model in the highly complex urban road scenario is 'faster cross-city generalization, higher iteration efficiency, and stronger user experience consistency.' From a market perspective, urban navigation-assisted driving is expanding from high-priced models to a wider price range, with the penetration rate of urban and highway navigation-assisted driving continuing to increase. Furthermore, 'lightweight or mapless' maps and a stronger data-driven architecture are becoming industry consensus, driving the industry into a more intense mass production competition phase. The supply-side competitive landscape is exhibiting a 'two-pronged approach': one is OEMs focusing on self-developed technologies, using end-to-end capabilities as brand differentiation; the other is third-party solution providers and system suppliers serving multiple OEMs with 'replicable mass-production platforms,' ??accelerating the large-scale deployment of end-to-end solutions in mid-range models. The risks and barriers to end-to-end L2 urban assisted driving are becoming more 'automotive-grade': the focus of market competition is shifting from 'whether it has the function' to 'usability and reliable delivery,' including stability in long-tail scenarios, takeover frequency and quality, robustness to the behavior of different urban traffic participants, and consistency of conservative strategies under extreme weather and low visibility conditions. Since the responsibility for Level 2 still rests with the driver, regulators and the public are more sensitive to function naming, promotional boundaries, and safety incidents. OEMs and suppliers need to integrate end-to-end models into an auditable engineering system:

operational design domain boundary management, driver monitoring, fault diagnosis and degradation, simulation and regression testing, and version governance and continuous software updates. Overall, end-to-end will become one of the mainstream implementation paths for advanced urban assisted driving more quickly, but what truly determines market share is often not the 'end-to-end' label, but whether mass production delivery capabilities and safety reliability can be consistently maintained across a larger user base in the long term.

LPI (LP Information)' newest research report, the “End-to-end L2 Urban Assisted Driving System Industry Forecast” looks at past sales and reviews total world End-to-end L2 Urban Assisted Driving System sales in 2025, providing a comprehensive analysis by region and market sector of projected End-to-end L2 Urban Assisted Driving System sales for 2026 through 2032. With End-to-end L2 Urban Assisted Driving System sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world End-to-end L2 Urban Assisted Driving System industry.

This Insight Report provides a comprehensive analysis of the global End-to-end L2 Urban Assisted Driving System landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyses the strategies of leading global companies with a focus on End-to-end L2 Urban Assisted Driving System portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global End-to-end L2 Urban Assisted Driving System market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for End-to-end L2 Urban Assisted Driving System and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global End-to-end L2 Urban Assisted Driving System.

This report presents a comprehensive overview, market shares, and growth opportunities of End-to-end L2 Urban Assisted Driving System market by product type, application, key players and key regions and countries.

Segmentation by Type:

Hardware

Software/Services

Segmentation by Driving Level:

L2

L2+

Segmentation by Technology:

Modular E2E

One-piece E2E

Segmentation by Application:

Mid-to-high-end Models

Economy Models

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered

from primary experts and analyzing the company's coverage, product portfolio, its market penetration.

Tesla

Nullmax

Momenta

Wayve

Comma.ai

XPeng In+B9:D28c.

Huawei

NIO

Li Auto Inc.

BYD

Zeekr (Geely Global)

DeepRoute.ai

ZYT Technology

Horizon

SenseTime

CHERY

Xiaomi

GAC Group

Shanghai Geometrical Perception and Learning Co., Ltd.

Pony AI Inc.

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