

Global In-vehicle Urban Navigation on Autopilot (NOA) Market Growth (Status and Outlook) 2026-2032

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Abstracts

The global In-vehicle Urban Navigation on Autopilot (NOA) market size is predicted to grow from US\$ 8222 million in 2025 to US\$ 79833 million in 2032; it is expected to grow at a CAGR of 35.5% from 2026 to 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.

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

This Insight Report provides a comprehensive analysis of the global In-vehicle Urban Navigation on Autopilot (NOA) 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 In-vehicle Urban Navigation on Autopilot (NOA) portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global In-vehicle Urban Navigation on Autopilot (NOA) market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for In-vehicle Urban Navigation on Autopilot (NOA) 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 In-vehicle Urban Navigation on Autopilot (NOA).

This report presents a comprehensive overview, market shares, and growth opportunities of In-vehicle Urban Navigation on Autopilot (NOA) market by product type, application, key players and key regions and countries.

Segmentation by Type:

Vision-based Urban NOA

LiDAR-based Urban NOA

Multi-sensor Fusion Urban NOA

Segmentation by Development Entity:

OEM Self-developed Urban NOA

Supplier-developed Urban NOA

Joint-development Urban NOA

Segmentation by Application:

Sedan

SUV

Others

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.

Momenta

Tesla

NIO

Li Auto

XPeng

Xiaomi

Huawei

DEEPROUTE

Horizon Robotics

Shenzhen Zhuoyu Technology Co., Ltd.

QCraft

Baidu Apollo

WeRide

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