

Global L2 and L2+ Autonomous Driving Market Growth (Status and Outlook) 2026-2032

<https://marketpublishers.com/r/G9873DD9D197EN.html>

Date: July 2026

Pages: 191

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

ID: G9873DD9D197EN

Abstracts

The global L2 and L2+ Autonomous Driving market size is predicted to grow from US\$ 14032 million in 2025 to US\$ 39897 million in 2032; it is expected to grow at a CAGR of 16.2% from 2026 to 2032.

L2 and L2+ Autonomous Driving refers to advanced partial driving automation where vehicles can control both steering and acceleration/deceleration simultaneously under driver supervision (Level 2), and enhanced Level 2+ systems which expand functional capabilities (like highway merging, lane changes) using additional perception and AI components while still requiring driver attention. L2/L2+ systems integrate sensors, high-performance compute platforms

The industry opportunity for L2 and L2+ autonomous driving is primarily driven by tightening safety regulations, long-term consumer demand for comfort and safety, and automakers' strategies to differentiate products through functional upgrades. Regulatory authorities in Europe, North America, and China continue to promote the adoption of active safety systems, creating an institutional foundation for the large-scale deployment of advanced driver assistance. At the same time, official corporate strategies increasingly emphasize software-defined vehicles and intelligent features as new sources of value. Declining sensor costs, rising performance of automotive-grade computing chips, and rapid algorithmic iteration have made advanced functions technically and economically viable, while challenges related to liability, misuse, and redundancy design have reinforced a cautious approach to system boundaries and human-machine interaction.

From a supply chain perspective, L2 and L2+ autonomous driving depend on close coordination across upstream and downstream players. Upstream segments are

dominated by semiconductors, sensors, and foundational software, with companies such as NVIDIA and Mobileye positioning their computing platforms as central to advanced driver assistance in official communications. Midstream integration is led by Tier-1 suppliers including Bosch, Continental, ZF, and Magna International, which are responsible for system integration and functional safety validation. Downstream, automakers define final system behavior and user experience, with Tesla, Toyota, Lexus, Cadillac, and multiple Chinese manufacturers publicly positioning L2 or L2+ systems as core features in mass-production models, demonstrating demand grounded in continuous product iteration rather than experimental deployment.

In terms of segmentation trends, demand for L2 and L2+ systems is expanding from highways and semi-controlled environments toward urban expressways and selected complex traffic scenarios. Product documentation indicates that adaptive cruise control, lane keeping, assisted lane changes, and traffic jam assist remain the most frequently used functions, with consumers prioritizing system stability and predictability over aggressive automation. Premium passenger vehicles and new energy models are increasingly serving as primary platforms for early adoption, reflecting automakers' strategy of scaling deployment while managing technical and reputational risk.

Regionally, North America is characterized by a technology-driven market environment and relatively high consumer acceptance, with several companies introducing feature updates early and refining performance through over-the-air upgrades. China and the broader Asia-Pacific region exhibit rapid application alongside localized development, supported by policy alignment, high new energy vehicle penetration, and increasingly mature domestic supply chains. Europe places stronger emphasis on functional safety, regulatory compliance, and human-machine interface standards, resulting in a more measured but engineering-driven rollout. Other regions primarily follow regulatory developments and import proven solutions, leading to region-specific configuration strategies for L2 and L2+ systems.

In recent years, a series of developments have shaped the trajectory of L2 and L2+ autonomous driving. In 2021, the United Nations Economic Commission for Europe implemented regulatory amendments that clarified the legal framework for lane keeping and assisted lane change functions. In 2022, multiple automakers publicly stated that L2+ systems would become long-term core configurations in key vehicle lines, highlighting the role of driver monitoring systems in mitigating misuse. In 2024, transportation safety authorities in several countries, as reported by authoritative media, strengthened oversight of marketing language and functional boundaries for driver assistance systems, further clarifying responsibility and usage conditions. Together,

these developments reinforce a path of steady, regulated advancement rather than abrupt technological leaps.

This report presents a comprehensive overview, market shares, and growth opportunities of L2 and L2+ Autonomous Driving market by product type, application, key players and key regions and countries.

Segmentation by Type:

L2 Autonomous Driving

L2+ Autonomous Driving

Segmentation by Perception Technology:

Camera-Based ADAS

Radar-Based ADAS

Lidar-Assisted Systems

Multi-Sensor Fusion

Segmentation by Compute Platform:

Edge AI Processor

Domain Controller

Centralized Compute

Distributed ECU Architecture

Segmentation by Compute Platform:

Rule-Based ADAS

AI/ML-Based ADAS

Map-Enhanced Automation

ROS/Autonomy Stack

Segmentation by Application:

Passenger Car

Commercial Car

This report also splits the market by region:

United States

China

Europe

Other regions

Japan

South Korea

Southeast Asia

Rest of world

The report also presents the market competition landscape and a corresponding detailed analysis of the major players in the market. The key players covered in this report:

Tesla, Inc. (NASDAQ: TSLA ? Texas, USA)

General Motors Company (NYSE: GM ? Michigan, USA)

Toyota Motor Corporation (TYO: 7203 ? Aichi, Japan)

NIO Inc. (NYSE: NIO ? Hefei, Anhui, China)

XPeng Inc. (NYSE: XPEV ? Guangzhou, China)

Li Auto Inc. (NASDAQ: LI ? Beijing, China)

BYD Co., Ltd. (SZSE: 002594 ? Shenzhen, Guangdong, China)

AITO (Seres Group + Huawei HIMA) (China)

Xiaomi SU7 (Xiaomi Auto, China)

Bosch GmbH (Non-listed ? Germany)

Continental AG (FWB: CON ? Hanover, Germany)

ZF Friedrichshafen AG (Non-listed ? Germany)

Mobileye Global Inc. (NASDAQ: MBLY ? Jerusalem, Israel)

NVIDIA Corporation (NASDAQ: NVDA ? California, USA)

Aptiv PLC (NYSE: APTV ? Dublin, Ireland)

Valeo SA (Euronext: FR ? Paris, France)

Denso Corporation (TYO: 6902 ? Aichi, Japan)

Hyundai Mobis Co., Ltd. (KRX: 012330 ? Seoul, South Korea)

Veoneer, Inc. (NYSE: VNE ? Michigan, USA)

Autoliv Inc. (NYSE: ALV ? Stockholm, Sweden)

Momenta (Non-listed ? Beijing, China)

Pony.ai (Non-listed ? Fremont / Beijing)

Aurora Innovation, Inc. (Non-listed ? USA)

Wayve Limited (Non-listed ? London, UK)

Huawei (ADS/HIMA project ? China)

Baidu, Inc. (NASDAQ: BIDU ? Beijing, China)

Volvo Cars (STO: VOLV ? Gothenburg, Sweden)

Mercedes-Benz (Subsidiary of Daimler AG ? Germany)

BMW AG (ETR: BMW ? Munich, Germany)

Nissan Motor Co., Ltd. (TYO: 7201 ? Yokohama, Japan)

Hyundai Motor Company (KRX: 005380 ? Seoul, South Korea)

Kia Corporation (KRX: 000270 ? Seoul, South Korea)

Volvo Group (STO: VOLV B ? Gothenburg, Sweden)

FCA Stellantis N.V. (EPA: STLA ? Amsterdam, Netherlands)

Ford Motor Company (NYSE: F ? Michigan, USA)

General Motors Company (NYSE: GM ? Michigan, USA)

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