

Autonomous Driving Software Market by Level of Autonomy (L2+, L3, L4), Vehicle Type (Passenger Cars, Commercial Vehicles), Propulsion (ICE, Electric), Software Type (Perception & Planning, Chauffeur, Interior Sensing, Monitoring) - Global Forecast to 2035

<https://marketpublishers.com/r/AEF02C9E5A91EN.html>

Date: August 2024

Pages: 360

Price: US\$ 3,217.50 (Single User License)

ID: AEF02C9E5A91EN

Abstracts

The global autonomous driving software market is projected to grow from USD 1.8 billion in 2024 to USD 7.0 billion in 2035, at a CAGR of 13.3%.

With the growing advancement and adoption of ADAS features, the complexity and significance of software in these vehicles is gaining consistent traction. Today, the passenger cars segment has already achieved 45-60% penetration in the L2/L2+ segment. As the automotive industry moves towards L3 and above autonomy levels, the cost of software in the vehicle is expected to rise to as high as 45% in the short term and fall consequently by 2035. Furthermore, the proliferation of electric vehicles and shared mobility services is increasing the demand for autonomous driving software. To stimulate demand, the new OEM wants to convert to a software-driven vehicle centralized architecture, develop modular vehicle skateboards, and increase spending on complementary technologies such as AI/Gen AI, intelligent cockpits, and higher levels of automation.

“L3 segment is expected to hold a significant share of autonomous driving software market during the forecast period.”

L3 autonomous vehicles employ cutting-edge software and hardware components that work together to build a precise, real-time map of the vehicle's surroundings, allowing the system to make sound driving decisions. The software algorithms process the data, detect potential threats, and handle complex driving conditions. All of these technologies respond to the growing need for road safety, propelling the autonomous

driving software sector. Multiple level 3 autonomous car models have been released in recent years. Mercedes-Benz, for example, launched the L3 S-Class and EQS autonomous passenger vehicles in 2023. BMW also offers L3 autonomy in the 7 Series G70. On the other hand, Stellantis plans to launch its L3 vans in 2024. During the forecast period, Asia Pacific is expected to hold the largest market size of autonomous driving software solutions in L3 autonomy. Asia Pacific countries are actively working on the development of higher autonomy in vehicles. Further, OEMs and technology providers in the region are actively collaborating to stay competitive in this evolving technological landscape. China and Japan are a few countries that have provided a testing ground for L3 autonomy. For instance, in December 2023, IM Motors (China) got a permit to test L3 self-driving vehicles in Shanghai. Previously, in September 2023, the Japanese government aimed for nationwide autonomous driving lanes. This means that the automated system can drive the vehicle under certain conditions, such as when the vehicle is in congested traffic on an expressway. “Perception and planning software to lead the development in fully autonomous vehicles”

Perception and planning software allow vehicles to effectively perceive and plan their way through the environment. Running a complex program, the software converts input data from an array of sensors—cameras, radar, and lidar—into a detailed and accurate model of the environment; thus, it classifies items like other vehicles, pedestrians, traffic signs, and obstructions by processing such data. All this allows a self-driven vehicle to make informed decisions in real time. Complex algorithms and methodologies are used for identification of environment and assessment for distinction between objects and forecasting the movement of the same. These are the key factors to stay collision-free and travel safely in a variety of driving conditions. Planning software defines the route that is safest and most efficient for the vehicle to follow. Safe and efficient routing is created by combining environmental data that is collected in real time with traffic rules. This includes real-time analysis of dynamic events, such as merging into a busy road or avoiding unexpected barriers. Planning software changes the path that the vehicle takes in response to changes in the environment to ensure that the ride is both smooth and safe. This includes real-time analysis of dynamic events, for example, merging into busy highways, and avoiding unexpected bottlenecks. The planning software continuously modifies the path of the vehicle according to environmental changes to ensure a smooth and safe ride.

Companies such as NVIDIA, Aurora Innovation Inc., Mobileye, PlusAI, and Waymo offer perception and planning software meant for autonomous driving. For instance, NVIDIA Drive is an end-to-end platform for autonomous vehicles, which consists of in-car computing hardware, including the Orin system-on-a-chip, while also including the complete software stack for AV and AI cockpit applications. It also provides PlusVision,

which is an AI program for perception used in advanced safety systems and ADAS applications, with increased levels of autonomy. It leverages the strongest deep neural networks, including transformer-based models, for best-in-class perceptual capabilities. PlusAI's PlusDrive is also an advanced L2+ Driver Assist System utilizing Level 4 autonomous driving technologies. Plus Drive® permits supervised autonomy in order for the drivers to execute maneuvers appropriately and safely.

“Europe is expected to have significant growth during the forecast period.”

According to experts, Europe's severe emission standards and zero-emission ambitions significantly impact passenger and commercial vehicle manufacturers. This led to most manufacturers working on ADAS and AD features for vehicles in the region. Countries such as Germany, France, and the UK have already allowed the use of autonomous vehicles on roads, with testing already being conducted over the years for the applicability of these vehicles on roads. Major automakers such as Audi, Volkswagen Group, Mercedes-Benz, Renault and BMW, provide these safety features in the region. The growth of the European autonomous driving software demand can be thus attributed to technological advancements in driver assistance features, and mandates for features such as traffic jam assist and blind-spot detection. Mandates for the adoption of features like as DMS, AEB, and LCW in passenger cars, which came into effect in July 2022, are expected to boost autonomous vehicle demand and, consequently, the European autonomous driving software sector. Since January 2023, the region has authorized Level 3 autonomous cars to travel at speeds of up to 130 km/h under specific traffic circumstances, including as on motorways and during lane changes.

In-depth interviews were conducted with CEOs, marketing directors, other innovation and technology directors, and executives from various key organizations operating in this market.

By Company Type: OEMs - 24%, Tier I - 67%, and Tier II - 9%,

By Designation: C- Level Executives - 33%, Directors - 52%, and Others - 15%

By Region: North America - 26%, Europe - 36%, and Asia Pacific - 38%

The autonomous driving software market is dominated by major players including Mobileye (Israel), NVIDIA Corporation (US), Qualcomm Technologies, Inc. (US), Huawei Technologies Co, Ltd (China), and Aurora Innovation Inc. (US). These companies are expanding their operations in self driving technologies to strengthen their software ecosystem.

Research Coverage:

The report covers the autonomous driving software market, in terms of Level of Autonomy (L2+, L3, L4), Vehicle Type (Passenger Cars, Commercial Vehicles), Propulsion Type (ICE, Electric), Software Type, and Region (Asia Pacific, Europe, and North America). It covers the competitive landscape and company profiles of the major players in the autonomous driving software market ecosystem.

The study also includes an in-depth competitive analysis of the key market players, along with their company profiles, key observations related to product and business offerings, recent developments, and key market strategies.

Key Benefits of Buying the Report:

The report will help market leaders/new entrants with information on the closest approximations of revenue numbers for the overall autonomous driving software market and its subsegments.

This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and plan suitable go-to-market strategies.

The report also helps stakeholders understand the market pulse and provides information on key market drivers, restraints, challenges, and opportunities.

The report also helps stakeholders understand the current and future pricing trends of autonomous driving software.

The report provides insight on the following pointers:

Analysis of key drivers (Increasing development and adoption of autonomous vehicles, Growing adherence to safety regulations for vehicles worldwide, Increasing advancements in ADAS technology, Integration of 5G technology for vehicle connectivity), restraints (Data privacy concerns, Lack of standardization in software architecture and hardware platforms), opportunities (Rising demand for safer and sustainable transportation solutions, Increasing adoption of ADAS in modern vehicles, Growing deployment of sensor fusion in automotive, Advancement in autonomous commercial vehicle technology), and challenges (High operational cost of cybersecurity measures, Compatibility and integration challenges in hardware and software components).

Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product & service launches in the autonomous driving software market.

Market Development: Comprehensive information about lucrative markets - the report analyses the autonomous driving software market across varied regions.

Market Diversification: Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the autonomous driving software market.

Competitive Assessment: In-depth assessment of market ranking, growth strategies, and service offerings of leading players like Mobileye (Israel), NVIDIA Corporation (US), Qualcomm Technologies, Inc. (US), Huawei Technologies Co, Ltd (China), and Aurora Innovation Inc. (US) among others in autonomous driving software market.

Contents

1 INTRODUCTION

- 1.1 STUDY OBJECTIVES
- 1.2 MARKET DEFINITION
- 1.3 STUDY SCOPE
 - 1.3.1 MARKET SEGMENTATION
 - 1.3.2 INCLUSIONS AND EXCLUSIONS
- 1.4 YEARS CONSIDERED
- 1.5 CURRENCY CONSIDERED
- 1.6 UNIT CONSIDERED
- 1.7 STAKEHOLDERS

2 RESEARCH METHODOLOGY

- 2.1 RESEARCH DATA
 - 2.1.1 SECONDARY DATA
 - 2.1.1.1 Key secondary sources
 - 2.1.1.2 Key data from secondary sources
 - 2.1.2 PRIMARY DATA
 - 2.1.2.1 Breakdown of primary interviews
 - 2.1.2.2 List of primary participants
- 2.2 MARKET SIZE ESTIMATION METHODOLOGY
 - 2.2.1 BOTTOM-UP APPROACH
 - 2.2.2 TOP-DOWN APPROACH
- 2.3 MARKET BREAKDOWN & DATA TRIANGULATION
 - 2.3.1 MARKET GROWTH PROJECTIONS FROM DEMAND-SIDE DRIVERS AND OPPORTUNITIES
- 2.4 FACTOR ANALYSIS
- 2.5 RESEARCH ASSUMPTIONS
- 2.6 RESEARCH LIMITATIONS
- 2.7 RISK ANALYSIS

3 EXECUTIVE SUMMARY

4 PREMIUM INSIGHTS

4.1 ATTRACTIVE OPPORTUNITIES FOR PLAYERS IN AUTONOMOUS DRIVING

Autonomous Driving Software Market by Level of Autonomy (L2+, L3, L4), Vehicle Type (Passenger Cars, Commercia...

SOFTWARE MARKET

4.2 AUTONOMOUS DRIVING SOFTWARE MARKET, BY REGION

4.3 AUTONOMOUS DRIVING SOFTWARE MARKET, BY LEVEL OF AUTONOMY

4.4 AUTONOMOUS DRIVING SOFTWARE MARKET, BY VEHICLE TYPE

4.5 AUTONOMOUS DRIVING SOFTWARE MARKET, BY PROPULSION

5 MARKET OVERVIEW

5.1 INTRODUCTION

5.2 MARKET DYNAMICS

5.2.1 DRIVERS

5.2.1.1 Focus on development and adoption of autonomous vehicles

5.2.1.2 Need for adherence to safety regulations

5.2.1.3 Increasing advancements in ADAS technology

5.2.1.4 Integration of 5G technology for vehicle connectivity

5.2.2 RESTRAINTS

5.2.2.1 Data privacy concerns

5.2.2.2 Lack of standardization in software architecture and hardware platforms

5.2.3 OPPORTUNITIES

5.2.3.1 Rising demand for safe and sustainable transportation solutions

5.2.3.2 Revenue streams through subscription models

5.2.3.3 Growing deployment of sensor fusion in automotive sector

5.2.3.4 Advancements in autonomous commercial vehicle technology

5.2.4 CHALLENGES

5.2.4.1 High operational costs

5.2.4.2 Compatibility and integration challenges in hardware and software components

5.3 TRENDS/DISRUPTIONS IMPACTING CUSTOMERS

5.3.1 TRENDS/DISRUPTIONS IMPACTING CUSTOMERS

5.4 VALUE CHAIN ANALYSIS

5.5 TECHNOLOGY ANALYSIS

5.5.1 INTRODUCTION

5.5.2 KEY TECHNOLOGIES

5.5.2.1 V2X connected autonomous vehicles

5.5.2.2 Artificial intelligence for sensor fusion

5.5.2.3 Edge computing for data processing

5.5.3 COMPLEMENTARY TECHNOLOGIES

5.5.3.1 Solid-state LiDAR

5.5.3.2 Terrain sensing system for autonomous vehicles

- 5.5.3.3 Automated valet parking (AVP)
- 5.5.3.4 Night vision and thermal imaging
- 5.5.4 ADJACENT TECHNOLOGIES
 - 5.5.4.1 Deep learning-based sensor fusion
 - 5.5.4.2 Blockchain with sensor fusion data
 - 5.5.4.3 Sensor fusion with Kalman filter
- 5.6 PRICING ANALYSIS
 - 5.6.1 AVERAGE SELLING PRICE TREND FOR AUTONOMY LEVELS, BY REGION
 - 5.6.2 AUTONOMOUS DRIVING SOFTWARE SUITE PRICE, BY LEADING OEM, 2023
- 5.7 ECOSYSTEM ANALYSIS
 - 5.7.1 OEMS
 - 5.7.2 COMPUTE UNIT PROVIDERS
 - 5.7.3 SOFTWARE STACK PROVIDERS
 - 5.7.4 MOBILITY PLATFORM PROVIDERS
- 5.8 KEY STAKEHOLDERS & BUYING CRITERIA
 - 5.8.1 KEY STAKEHOLDERS IN BUYING PROCESS
 - 5.8.2 BUYING CRITERIA
- 5.9 CASE STUDY ANALYSIS
 - 5.9.1 CONTINENTAL AG DEVELOPED INNOVATIVE SOLUTIONS TO ADDRESS CHALLENGES OF AUTONOMOUS DRIVING IN URBAN AREAS
 - 5.9.2 CONTINENTAL AG DEVELOPED INTELLIGENT AND SPECIALIZED SOFTWARE TO ENHANCE HUMAN-MACHINE INTERACTION
 - 5.9.3 PLUSDRIVE IMPROVED SAFETY BY AUTONOMOUSLY MANAGING CHALLENGING DRIVING SCENARIOS
 - 5.9.4 CAVFORTH INTRODUCED FUSION PROCESSING'S CAVSTAR AUTONOMOUS DRIVE SYSTEM INSTALLED ON ALEXANDER DENNIS SINGLE-DECKER BUSES
 - 5.9.5 WAYMO INTEGRATED SOPHISTICATED PERCEPTION SYSTEM USING COMPREHENSIVE ARRAY OF SENSORS TO REDUCE TRAFFIC-RELATED FATALITIES
 - 5.9.6 AMBARELLA'S MODULAR AD SOFTWARE AND HARDWARE SOLUTIONS EMPOWERED AUTOMOTIVE OEMS TO DEPLOY SCALABLE AUTONOMOUS DRIVING FEATURES ACROSS VEHICLE FLEETS
- 5.10 PATENT ANALYSIS
 - 5.10.1 INTRODUCTION
 - 5.10.2 LEGAL STATUS OF PATENTS
- 5.11 INVESTMENT & FUNDING SCENARIO
- 5.12 FUNDING, BY USE CASE

5.13 REGULATORY LANDSCAPE

5.13.1 REGULATIONS ON AUTONOMOUS VEHICLE USAGE, BY COUNTRY

5.13.2 REGULATIONS AND INITIATIVES ON ADAS, BY COUNTRY

5.13.3 REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

5.14 KEY CONFERENCES & EVENTS, 2024–2025

5.15 MNM INSIGHTS ON KEY OEMS' INCLINATION TOWARD IN-HOUSE SOFTWARE DEVELOPMENT

5.16 MNM INSIGHTS ON CHALLENGES FACED IN AUTONOMOUS DRIVING

5.16.1 INFRASTRUCTURE AND TECHNOLOGY INTEGRATION

5.16.2 UNIVERSAL ACCURACY AND ADAPTABILITY IN AUTONOMOUS CARS

5.16.3 SECURING PRIVACY AND CYBERSECURITY

5.16.4 OPERATING AUTONOMOUS VEHICLES IN BAD WEATHER

5.16.5 NASCENT STAGE OF AI

5.16.6 REGULATORY AND LEGAL ISSUES

5.17 MNM INSIGHTS ON LIDAR UTILIZATION STRATEGIES FOR AUTONOMOUS DRIVING

5.17.1 LONG-RANGE LIDAR SYSTEMS

5.17.2 SHORT-RANGE LIDAR SYSTEMS

5.17.3 INTEGRATED MULTIPLE CAMERA-RADAR SYSTEMS AS ALTERNATIVE TO LIDAR

5.18 MNM INSIGHTS ON USE OF SIMULATORS BY OEMS

5.19 MNM INSIGHTS ON STRATEGIES EMPLOYED FOR UTILIZATION OF HD MAPS

5.20 IMPACT OF AI ON AUTONOMOUS VEHICLES

5.21 MNM INSIGHTS ON BUSINESS MODELS FOR AUTONOMOUS DRIVING MONETIZATION

6 AUTONOMOUS DRIVING SOFTWARE MARKET, BY LEVEL OF AUTONOMY

6.1 INTRODUCTION

6.2 L2+

6.2.1 REGULATORY INITIATIVES TO DRIVE MARKET

6.3 L3

6.3.1 SURGE IN DEMAND FOR ROAD SAFETY TO DRIVE MARKET

6.4 L4

6.4.1 SHIFT TOWARD FULL AUTOMATION TO DRIVE MARKET

6.5 KEY INDUSTRY INSIGHTS

7 AUTONOMOUS DRIVING SOFTWARE MARKET, BY VEHICLE TYPE

7.1 INTRODUCTION

7.1.1 OPERATIONAL DATA

7.2 PASSENGER CARS

7.2.1 STRINGENT MANDATES FOR ADAS INTEGRATION TO DRIVE MARKET

7.3 COMMERCIAL VEHICLES

7.3.1 INNOVATIONS IN AUTOMATED DRIVING TECHNOLOGY TO DRIVE MARKET

7.4 KEY INDUSTRY INSIGHTS

8 AUTONOMOUS DRIVING SOFTWARE MARKET, BY PROPULSION

8.1 INTRODUCTION

8.2 ICE

8.2.1 IMPROVED AWARENESS REGARDING EMISSION-FRIENDLY TRANSPORTATION TO DRIVE MARKET

8.3 ELECTRIC

8.3.1 NEED FOR COMPLIANCE WITH STRINGENT EMISSION AND SAFETY REGULATIONS TO DRIVE MARKET

8.4 KEY INDUSTRY INSIGHTS

9 AUTONOMOUS DRIVING SOFTWARE MARKET, BY SOFTWARE TYPE

9.1 INTRODUCTION

9.2 PERCEPTION & PLANNING SOFTWARE

9.3 CHAUFFEUR SOFTWARE

9.4 INTERIOR SENSING SOFTWARE

9.5 SUPERVISION & MONITORING SOFTWARE

10 AUTONOMOUS DRIVING SOFTWARE MARKET, BY REGION

10.1 INTRODUCTION

10.2 ASIA PACIFIC

10.2.1 CHINA

10.2.1.1 Increasing autonomous vehicle testing by ride-hailing aggregators to drive market

10.2.2 JAPAN

10.2.2.1 Government's push for development of autonomous vehicles to drive market

10.2.3 SOUTH KOREA

10.2.3.1 Government's focus on autonomous vehicle deployment to drive market

10.2.4 INDIA

10.2.4.1 Growing emphasis on safety in automobile industry to drive market

10.3 EUROPE

10.3.1 GERMANY

10.3.1.1 Robust autonomous vehicle development ecosystem to drive market

10.3.2 FRANCE

10.3.2.1 Government's mandates for road safety to drive market

10.3.3 UK

10.3.3.1 Increasing demand for advanced safety and luxury in vehicles to drive market

10.3.4 SPAIN

10.3.4.1 Evolving consumer preferences and technological advancements to drive market

10.3.5 SWEDEN

10.3.5.1 Advancements in autonomous driving technology coupled with supportive regulatory frameworks to drive market

10.4 NORTH AMERICA

10.4.1 US

10.4.1.1 Government's support and presence of leading autonomous driving software providers to drive market

10.4.2 CANADA

10.4.2.1 Government's investment in development of connected and autonomous ecosystems to drive market

11 COMPETITIVE LANDSCAPE

11.1 OVERVIEW

11.2 KEY PLAYER STRATEGIES/RIGHT TO WIN

11.3 MARKET RANKING ANALYSIS

11.4 REVENUE ANALYSIS

11.5 COMPANY VALUATION AND FINANCIAL METRICS

11.6 BRAND/PRODUCT COMPARISON

11.7 COMPANY EVALUATION MATRIX: KEY PLAYERS, 2023

11.7.1 STARS

11.7.2 EMERGING LEADERS

11.7.3 PERVASIVE PLAYERS

11.7.4 PARTICIPANTS

- 11.7.5 COMPANY FOOTPRINT: KEY PLAYERS, 2023
- 11.8 COMPANY EVALUATION MATRIX: STARTUPS/SMES, 2023
 - 11.8.1 PROGRESSIVE COMPANIES
 - 11.8.2 RESPONSIVE COMPANIES
 - 11.8.3 DYNAMIC COMPANIES
 - 11.8.4 STARTING BLOCKS
 - 11.8.5 COMPETITIVE BENCHMARKING
- 11.9 COMPETITIVE SCENARIO
 - 11.9.1 PRODUCT LAUNCHES & DEVELOPMENTS
 - 11.9.2 DEALS
 - 11.9.3 EXPANSION
 - 11.9.4 OTHER DEVELOPMENTS

12 COMPANY PROFILES

- 12.1 KEY PLAYERS
 - 12.1.1 MOBILEYE
 - 12.1.1.1 Business overview
 - 12.1.1.2 Products/Solutions/Services offered
 - 12.1.1.3 Recent developments
 - 12.1.1.3.1 Product launches & developments
 - 12.1.1.3.2 Deals
 - 12.1.1.3.3 Other developments
 - 12.1.1.4 MnM view
 - 12.1.1.4.1 Key strengths
 - 12.1.1.4.2 Strategic choices
 - 12.1.1.4.3 Weaknesses and competitive threats
 - 12.1.2 NVIDIA CORPORATION
 - 12.1.2.1 Business overview
 - 12.1.2.2 Products/Solutions/Services offered
 - 12.1.2.3 Recent developments
 - 12.1.2.3.1 Product launches & developments
 - 12.1.2.3.2 Deals
 - 12.1.2.4 MnM view
 - 12.1.2.4.1 Key strengths
 - 12.1.2.4.2 Strategic choices
 - 12.1.2.4.3 Weaknesses and competitive threats
 - 12.1.3 QUALCOMM TECHNOLOGIES, INC.
 - 12.1.3.1 Business overview

- 12.1.3.2 Products/Solutions/Services offered
- 12.1.3.3 Recent developments
 - 12.1.3.3.1 Product launches & developments
 - 12.1.3.3.2 Deals
- 12.1.3.4 MnM view
 - 12.1.3.4.1 Key strengths
 - 12.1.3.4.2 Strategic choices
 - 12.1.3.4.3 Weaknesses and competitive threats
- 12.1.4 HUAWEI TECHNOLOGIES CO., LTD.
 - 12.1.4.1 Business overview
 - 12.1.4.2 Products/Solutions/Services offered
 - 12.1.4.3 Recent developments
 - 12.1.4.3.1 Deals
 - 12.1.4.3.2 Expansion
 - 12.1.4.3.3 Other developments
 - 12.1.4.4 MnM view
 - 12.1.4.4.1 Key strengths
 - 12.1.4.4.2 Strategic choices
 - 12.1.4.4.3 Weaknesses and competitive threats
- 12.1.5 AURORA INNOVATION, INC.
 - 12.1.5.1 Business overview
 - 12.1.5.2 Products/Solutions/Services offered
 - 12.1.5.3 Recent developments
 - 12.1.5.3.1 Product launches & developments
 - 12.1.5.3.2 Deals
 - 12.1.5.4 Other developments
 - 12.1.5.5 MnM view
 - 12.1.5.5.1 Key strengths
 - 12.1.5.5.2 Strategic choices
 - 12.1.5.5.3 Weaknesses and competitive threats
- 12.1.6 APTIV
 - 12.1.6.1 Business overview
 - 12.1.6.2 Products/Solutions/Services offered
 - 12.1.6.3 Recent developments
 - 12.1.6.3.1 Deals
 - 12.1.6.3.2 Expansion
 - 12.1.6.3.3 Other developments
- 12.1.7 BLACKBERRY LIMITED
 - 12.1.7.1 Business overview

- 12.1.7.2 Products/Solutions/Services offered
- 12.1.7.3 Recent developments
 - 12.1.7.3.1 Product launches & developments
 - 12.1.7.3.2 Deals
- 12.1.8 PLUSAI, INC.
 - 12.1.8.1 Business overview
 - 12.1.8.2 Products/Solutions/Services offered
 - 12.1.8.3 Recent developments
 - 12.1.8.3.1 Product launches & developments
 - 12.1.8.3.2 Deals
 - 12.1.8.3.3 Other developments
- 12.1.9 KODIAK ROBOTICS, INC.
 - 12.1.9.1 Business overview
 - 12.1.9.2 Products/Solutions/Services offered
 - 12.1.9.3 Recent developments
 - 12.1.9.3.1 Product launches & developments
 - 12.1.9.3.2 Deals
- 12.1.10 OXA AUTONOMY LIMITED
 - 12.1.10.1 Business overview
 - 12.1.10.2 Products/Solutions/Services offered
 - 12.1.10.3 Recent developments
 - 12.1.10.3.1 Product launches & developments
 - 12.1.10.3.2 Deals
 - 12.1.10.3.3 Other developments
- 12.1.11 GREEN HILLS SOFTWARE
 - 12.1.11.1 Business overview
 - 12.1.11.2 Products/Solutions/Services offered
 - 12.1.11.3 Recent developments
 - 12.1.11.3.1 Deals
 - 12.1.11.3.2 Other developments
- 12.1.12 CONTINENTAL AG
 - 12.1.12.1 Business overview
 - 12.1.12.2 Products/Solutions/Services offered
 - 12.1.12.3 Recent developments
 - 12.1.12.3.1 Product launches & launches
 - 12.1.12.3.2 Deals
 - 12.1.12.3.3 Expansion
 - 12.1.12.3.4 Other developments
- 12.1.13 HITACHI ASTEMO, LTD.

- 12.1.13.1 Business overview
- 12.1.13.2 Products/Solutions/Services offered
- 12.1.13.3 Recent developments
 - 12.1.13.3.1 Product launches & developments
 - 12.1.13.3.2 Deals
 - 12.1.13.3.3 Other developments
- 12.1.14 CARIAD
 - 12.1.14.1 Business overview
 - 12.1.14.2 Products/Solutions/Services offered
 - 12.1.14.3 Recent developments
 - 12.1.14.3.1 Deals
 - 12.1.14.3.2 Expansion
 - 12.1.14.3.3 Other developments
- 12.1.15 PONY.AI
 - 12.1.15.1 Business overview
 - 12.1.15.2 Products/Solutions/Services offered
 - 12.1.15.3 Recent developments
 - 12.1.15.3.1 Product launches & developments
 - 12.1.15.3.2 Deals
 - 12.1.15.3.3 Other developments
- 12.1.16 BAIDU, INC.
 - 12.1.16.1 Business overview
 - 12.1.16.2 Products/Solutions/Services offered
 - 12.1.16.3 Recent developments
 - 12.1.16.3.1 Product launches & developments
 - 12.1.16.3.2 Deals
 - 12.1.16.3.3 Expansion
 - 12.1.16.3.4 Other developments
- 12.1.17 WAYMO LLC
 - 12.1.17.1 Business overview
 - 12.1.17.2 Products/Solutions/Services offered
 - 12.1.17.3 Recent developments
 - 12.1.17.3.1 Product launches & developments
 - 12.1.17.3.2 Deals
 - 12.1.17.3.3 Expansion
 - 12.1.17.3.4 Other developments
- 12.2 OTHER PLAYERS
 - 12.2.1 IMAGRY AUTONOMOUS DRIVING SOFTWARE COMPANY
 - 12.2.2 WERIDE.AI

- 12.2.3 ZOOX, INC.
- 12.2.4 CRUISE LLC
- 12.2.5 ZF FRIEDRICHSHAFEN AG
- 12.2.6 TUSIMPLE HOLDINGS INC.
- 12.2.7 KPIT
- 12.2.8 LUXOFT, A DXC TECHNOLOGY COMPANY
- 12.2.9 EMBARK TRUCK, INC.
- 12.2.10 WAYVE TECHNOLOGIES LTD.
- 12.2.11 DRIVEBLOCKS
- 12.2.12 SENSETIME
- 12.2.13 EASYMILE
- 12.2.14 SCANIA
- 12.2.15 UISEE
- 12.2.16 COAST AUTONOMOUS, INC.
- 12.2.17 NAVISTAR
- 12.2.18 VECTOR INFORMATIK GMBH
- 12.2.19 APEX.AI, INC.
- 12.2.20 HORIZON ROBOTICS
- 12.2.21 TATA TECHNOLOGIES
- 12.2.22 ROBERT BOSCH GMBH
- 12.2.23 WOVEN BY TOYOTA, INC.

13 APPENDIX

- 13.1 INSIGHTS FROM INDUSTRY EXPERTS
- 13.2 DISCUSSION GUIDE
- 13.3 KNOWLEDGESTORE: MARKETSANDMARKETS' SUBSCRIPTION PORTAL
- 13.4 CUSTOMIZATION OPTIONS
 - 13.4.1 AUTONOMOUS DRIVING SOFTWARE MARKET, BY LEVEL OF AUTONOMY, AT REGIONAL LEVEL
 - 13.4.2 AUTONOMOUS DRIVING SOFTWARE MARKET, BY VEHICLE TYPE, AT COUNTRY LEVEL
 - 13.4.3 AUTONOMOUS DRIVING SOFTWARE MARKET, BY PROPULSION, AT COUNTRY LEVEL
 - 13.4.4 PROFILING OF ADDITIONAL MARKET PLAYERS (UP TO THREE)
- 13.5 RELATED REPORTS
- 13.6 AUTHOR DETAILS

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