

# Europe & CIS Semi & Fully Autonomous Vehicle Market By Automation Level (L1, L2, L3, L4, L5), By Vehicle Type (Passenger Car, Commercial Vehicle), By Country, Competition, Opportunities and Forecast, 2020-2030F

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## Abstracts

### Market Overview:

Europe & CIS Semi & Fully Autonomous Vehicle Market was valued at USD 15.51 Billion in 2024 and is expected to reach USD 26.81 Billion by 2030 with a CAGR of 9.55% during the forecast period. The Europe & CIS semi and fully autonomous vehicle market is witnessing accelerated development due to evolving consumer preferences for intelligent mobility, rising deployment of advanced driver assistance systems, and strong momentum in AI-driven vehicular technologies. Growth is being driven by improvements in sensor fusion, real-time data analytics, and regulatory encouragement for vehicle automation across multiple segments. The industry is also benefiting from automotive OEMs integrating higher levels of autonomy into mainstream vehicle platforms, shifting autonomous features from luxury to mid-range models. Increasing collaboration between tech firms and automakers is enabling faster prototyping and deployment of Level 3 and Level 4 capabilities. For instance, Level 3 autonomous driving features are set to account for almost 20% of new car sales in Europe by 2025. Implementing Level 3 autonomy significantly increases vehicle costs and sensor complexity. ADAS average content per vehicle is projected to rise from \$533 (Level 2) to \$1,046–\$2,289 (Level 3), depending on lidar inclusion. Advanced functionality requires more sensors (up to 17 or more), AI software, supercomputing hardware, and high-definition mapping. These cost dynamics are pushing OEMs toward platform collaborations with Tier 1 and Tier 2 suppliers to scale development and reduce time-to-market.

## Market Drivers

### Advancements in ADAS and Sensor Technologies

Advanced Driver Assistance Systems (ADAS) and sensor technologies are rapidly evolving, enabling vehicles to interpret their surroundings with greater accuracy and reliability. High-performance radar, lidar, ultrasonic sensors, and high-resolution cameras are now capable of delivering real-time data with minimal latency, enhancing the responsiveness and decision-making abilities of semi and fully autonomous systems. These technologies are foundational to enabling Level 2 to Level 4 autonomy, allowing vehicles to safely perform tasks such as adaptive cruise control, lane-keeping, automatic emergency braking, and traffic sign recognition. The increasing integration of AI-powered perception systems helps autonomous platforms better navigate complex urban environments and dynamically changing traffic scenarios. Innovations in sensor miniaturization and multi-modal data fusion are expanding the range and precision of detection systems, reducing blind spots and improving low-light performance. These improvements are not only making autonomous driving more feasible but are also increasing consumer confidence in self-driving capabilities.

### Key Market Challenges

#### Lack of Regulatory and Legal Standardization

The absence of harmonized legal and regulatory frameworks poses a significant challenge to the adoption of semi and fully autonomous vehicles. Different jurisdictions have varying definitions, testing protocols, liability norms, and data privacy requirements, complicating the global rollout of autonomous platforms. This fragmentation creates uncertainty for automakers and technology providers in terms of compliance, deployment scalability, and cross-border operations. Regulatory delays can also hinder innovation cycles by forcing companies to adopt a wait-and-see approach instead of aggressively piloting new technologies. Ambiguity in assigning legal responsibility in the event of accidents involving autonomous vehicles further exacerbates public and insurance sector skepticism. Without clear legislative backing, widespread consumer acceptance and market readiness remain subdued.

### Key Market Trends

#### Growing Integration of V2X Communication Systems

Vehicle-to-Everything (V2X) communication systems are increasingly being integrated into autonomous vehicle platforms to enhance safety, coordination, and situational awareness. V2X enables real-time information exchange between vehicles, infrastructure, pedestrians, and cloud-based systems, creating a connected ecosystem that supports autonomous decision-making. This connectivity allows vehicles to anticipate traffic conditions, receive alerts about upcoming hazards, and coordinate movements at intersections to avoid collisions. Integration with smart traffic signals, road sensors, and weather monitoring systems further enhances vehicle intelligence and adaptability. The use of 5G and edge computing technologies is accelerating the rollout of low-latency V2X networks, making it possible for vehicles to process data faster and respond more accurately to dynamic environments. For instance, by 2030 in Europe, 5G adoption is projected to reach 87%, driven by the rapid decline of legacy networks 2G adoption falling below 1%, 3G below 2%, and 4G dropping to just 12%. With over 574 million 5G connections expected and 4G adoption decreasing steadily from 69% to under 20%, the shift toward next-generation connectivity will define the mobile landscape, signaling a nearly complete transition to high-speed mobile internet by the end of the decade. This trend supports higher levels of automation by reducing the reliance on vehicle-only perception and enabling cooperative driving strategies. V2X also plays a critical role in fleet operations, enabling real-time tracking, route optimization, and remote diagnostics.

### **Key Market Players**

BYD Europe B.V.

Daimler AG

Lucid Group, Inc.

Toyota Motor Corp.

Nissan Motor Co. Ltd

Volvo Car Group

General Motors Company

Volkswagen AG

Tesla Inc.

BMW AG

### **Report Scope:**

In this report, the Europe & CIS Semi & Fully Autonomous Vehicle Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Europe & CIS Semi & Fully Autonomous Vehicle Market, By Automation Level:

L1

L2

L3

L4

L5

Europe & CIS Semi & Fully Autonomous Vehicle Market, By Vehicle Type:

Passenger Car

Commercial Vehicle

Europe & CIS Semi & Fully Autonomous Vehicle Market, By Country:

Germany

Russia

France

Spain

Italy

United Kingdom

Poland

Rest of Europe & CIS

### **Competitive Landscape**

Company Profiles: Detailed analysis of the major companies presents in the Europe & CIS Semi & Fully Autonomous Vehicle Market.

### **Available Customizations:**

Europe & CIS Semi & Fully Autonomous Vehicle Market report with the given market data, TechSci Research offers customizations according to the company's specific needs. The following customization options are available for the report:

### **Company Information**

Detailed analysis and profiling of additional market players (up to five).

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