The Global ADAS and Autonomous Car Market

2nd Edition

The Global ADAS and Autonomous Car Market is the second consecutive report from Berg Insight analysing the latest developments on the autonomous car market worldwide. This strategic research report from Berg Insight provides you with 230 pages of unique business intelligence including 6-year industry forecasts and expert commentary on which to base your business decisions.

Berg Insight™

Berg Insight forecasts rapid growth for ADAS in new passenger cars

The introduction of more sophisticated ADAS functions in modern vehicles is one of the major technology trends affecting the automotive industry. Common ADAS functions range from more basic safety functions to advanced automated driving capabilities such as adaptive cruise control, lane centering, automated lane changes, automated parking and hands-free driver assistance systems. Such functions are no longer limited to premium vehicles. Mass-market manufacturers are also prioritising ADAS as safety ratings, regulatory requirements and competitive pressure make advanced driver assistance increasingly important across vehicle segments. The regulatory environment for ADAS and automated driving plays a major role in shaping the future for the industry. The field of automated driving is heavily regulated as the safety aspect is considered important by legal stakeholders.

In 2025, Berg Insight estimates that 55.6 percent of all new passenger cars sold globally fulfilled requirements for SAE Level 1–3 driving automation. About 20.0 percent of all vehicles sold in 2025 were categorised under the L1 segment while 35.6 percent were categorised under the L2 segment. Only a very small percentage of cars sold in 2025 could be categorised as L3. L3 availability was limited to a few premium models, including Mercedes-Benz S-Class and EQS models in Germany and in select US states, as well as select BMW 7 Series models in Germany. In 2031, Berg Insight forecasts that 76.9 percent of all new passenger cars sold globally will fulfil requirements for L1–L3 driving automation. About 14.8 percent of all new cars sold in 2031 are expected to be categorised as L1 and 57.3 percent as L2. As a subset of the L2 category, L2+ provides additional features compared to L2 systems. Berg Insight estimates that 8.0 million new passenger cars sold globally in 2025 were equipped with L2+ ADAS capabilities, corresponding to an attach rate of 9.2 percent. This number is expected to reach 28.4 million units in 2031, corresponding to an attach rate of 31.0 percent. About 4.8 percent of all new cars, corresponding to 4.4 million vehicles, are expected to be sold with L3 capabilities in 2031. Passenger car L4 vehicles are not expected to scale in meaningful volumes before 2031.

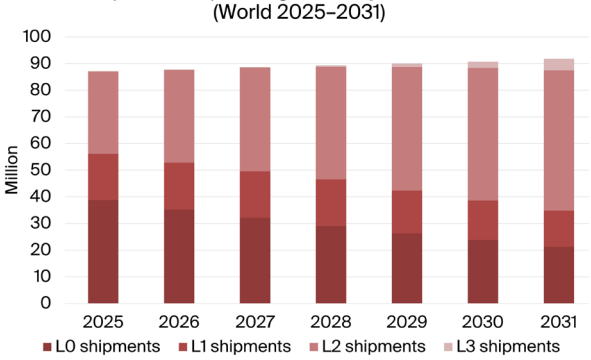
Advanced ADAS has become a major differentiator. Today, automakers mainly focus on L1 and L2/L2+ ADAS functions. BMW and Mercedes-Benz have both offered L3 systems, but have recently reduced their near-term emphasis on L3 and shifted focus towards more scalable L2+ systems. Chinese OEMs are among the most active in the deployment of sophisticated L2/L2+ ADAS. Leading Chinese OEMs include BYD Auto, Changan, Chery, Geely, GWM, Leapmotor, Li Auto, NIO, SAIC and XPeng. Other global OEMs offering sophisticated ADAS include for example Tesla with Full Self-Driving (Supervised), Ford with BlueCruise, General Motors with Super Cruise, Nissan with ProPILOT 2.0/2.1, Toyota with Teammate Advanced Drive, Hyundai Motor Group with Highway Driving Assist 2, Volkswagen with IQ.DRIVE/Travel Assist and Audi with Adaptive Driving Assistant Plus.

There are a number of categories of suppliers serving the market including Tier 1s, semiconductor solution providers, AD software companies, LiDAR suppliers and map providers. Leading global Tier 1 suppliers include Aptiv, Astemo, Aumovio (formerly Continental), Bosch, Denso, Desay SV, Forvia, HL Klemove, Hyundai Mobis, Jingwei Hirain, Magna International, Valeo and ZF Group.

Suppliers of SoCs and related technologies are at the core of the progress in automated driving, as they provide the high-performance computing, AI capabilities and related semiconductor content needed to power vehicles with advanced automated driving functions. Leading providers in this segment include AMD, Ambarella, Black Sesame Technologies, Horizon Robotics, Infineon, Mobileye, NVIDIA, NXP Semiconductors, Qualcomm, Renesas Electronics, STMicroelectronics and Texas Instruments. The automotive semiconductor ecosystem for automated driving includes vendors of high-performance compute platforms as well as suppliers of microcontrollers, sensors, power semiconductors and other enabling semiconductor technologies.

Automated driving software and integrated driving solution providers such as Deeproute.ai, Huawei, Momenta, QCraft, Wayve, WeRide and Zhuoyu Technology develop automated driving stacks, perception software and turnkey assisted driving systems for OEMs. There are moreover companies specialising in LiDAR sensors for higher-end ADAS and automated driving applications. Leading LiDAR sensor providers include Hesai Technology, Innoviz, RoboSense and Seyond. Mapping and navigation platform providers such as Amap (AutoNavi), Dynamic Map Platform, HERE Technologies, Mapbox , NavInfo and TomTom provide mapping, navigation and localisation solutions.

Shipments of passenger cars by SAE Level 0–3 (World 2025–2031)



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Hightlights from the report

Insights from 30 executive interviews with market leading companies.

New data on car populations and new registrations worldwide.

Comprehensive overview of the ADAS value chain and key applications.

Detailed profiles of 26 major car OEMs and their ADAS propositions.

Detailed descriptions of 42 technology vendors and their ADAS and autonomous car solutions.

In-depth analysis of market trends and key developments.

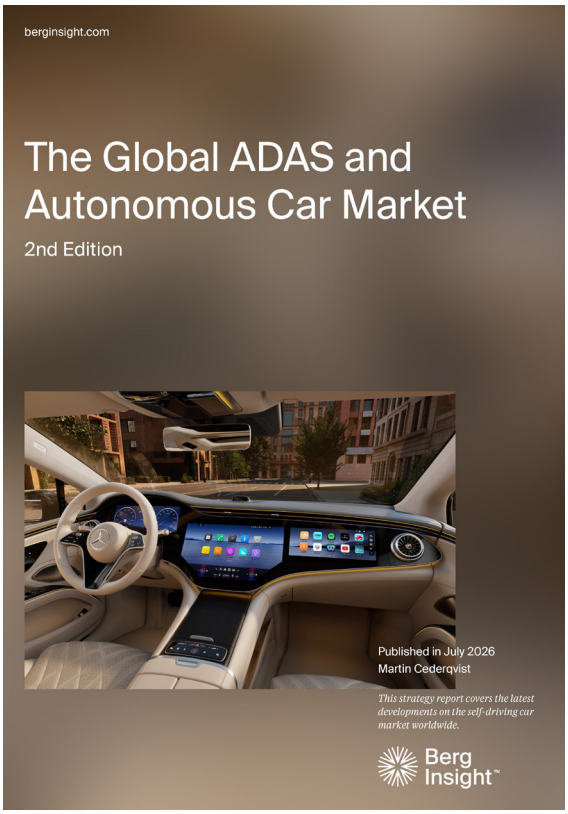
Updated market forecasts by region lasting until 2031.

The report answers the following questions

- What is the current status of the ADAS and autonomous car industry?
- Which are the autonomous vehicle technology providers?
- What ADAS offerings are available from the leading car OEMs today?
- What business models are used by car OEMs for ADAS?
- How will the market evolve in Europe, North America, China, Japan, South Korea and RoW?
- How will emerging AI technologies impact the development of autonomous vehicles?
- How will the regulatory environment shape the future of the autonomous vehicle industry?
- Which are the key future trends in this industry?

About Berg Insight's IoT market research

Our market reports offer comprehensive information and analysis on key IoT technologies and markets, addressing important concerns including total addressable market, market penetration, market shares, industry landscape, regulatory environment, market trends and forecasts. Our research portfolio today comprises more than 85 items, where each market report focuses on a specific vertical application area or cover horizontal themes. All market reports come with complementary data sets in Excel format that can be easily analysed and converted into tables and charts. We offer a range of different license options together with bundled packages and subscriptions to suit your specific needs.



AUTOMOTIVE

The Global ADAS and Autonomous Car Market

How will the market for ADAS evolve in the next years? The report covers the latest trends and developments covering detailed descriptions about the major ADAS and self-driving car projects worldwide. Berg Insight forecasts that 76.9 percent of all new passenger cars sold globally in 2031 will fulfil requirements for SAE Level 1–3 driving automation. Get up to date with the latest information about vendors, products and markets in this new 230-page report.

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Who should read this report?

The Global ADAS and Autonomous Car Market is the foremost source of information about the rapid adoption of ADAS and autonomous vehicle technology. Whether you are a car manufacturer, Tier 1 supplier, semiconductor vendor, connectivity provider, content provider, investor, consultant, or government agency, you will gain valuable insights from our in-depth research.

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Martin is an IoT analyst covering mainly the automotive sector. He performs strategic analysis of OEM and aftermarket car telematics services, data monetisation services such as insurance telematics and shared mobility, among many other topics. Martin holds a Master's degree in Industrial Engineering and Management from Chalmers University of Technology and joined Berg Insight in 2022.

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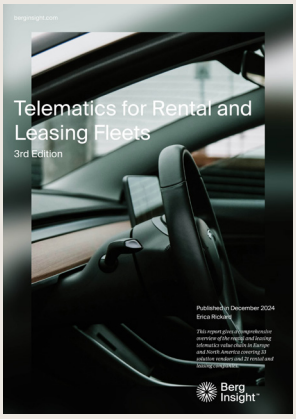

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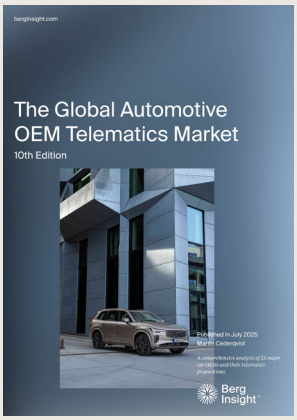

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