WE DEFINE
FUTURE IMPACT

TECHNOLOGY
SOFTWARE
CONSULTING

ADAS
Market Intelligence
EU / NAR / Asia

BUSINESS
AS UNUSUAL

P3 ADAS Market Insights

We analyze global OEMs regarding ADAS capabilities across the NAR, EU, and Asian markets.

Created by:

Michael Herdrich
P3 automotive GmbH
Wilhelm-Wagenfeld-Str. 22
80807 München
Germany

Alexander Boll
P3 automotive GmbH
Heilbronnerstr. 86
70191 Stuttgart
Germany

Last update: **2026/03**

Edition #6/2026

CONTACT

Please feel free to reach out & connect!

Michael Herdrich

Consultant Autonomous Mobility & ADAS

T: +49 152 046 353 90

@: michael.herdrich@p3-group.com

Alexander Boll

Senior Consultant Autonomous Mobility & ADAS

T: +49 151 441 387 96

@: alexander.boll@p3-group.com

P3 Group website

P3 Insights about ADAS Experience Day CN 2025

P3 Insights about ADAS Experience Day EU 2025

Address

P3 group GmbH

Heilbronner Straße 86
70191 Stuttgart

Germany

Get connected

+49 711 252 749-0

mail@p3-group-com

www.p3-group.com

P3 & P3 Autonomous Mobility.

General Introduction

Locations

Europe

Germany	Stuttgart	**Serbia**	Belgrade
	Munich		Subotica
	Wolfsburg	**Romania**	Cluj-Napoca
	Düsseldorf	**Greece**	Athens
	Berlin	**Czech Rep**	Prague
	Hamburg	**Bulgaria**	Sofia
	Frankfurt		Gabrovo
	Osnabrück	**Denmark**	Copenhagen
France	Paris	**Poland**	Wroclaw
	Toulouse		

Asia

China	Beijing	**South Korea**	Seoul
	Shanghai	**Thailand**	Bangkok
	Shenzhen	**Japan**	Tokyo
	Hefei	**Vietnam**	Hanoi
		India	Pune

Africa

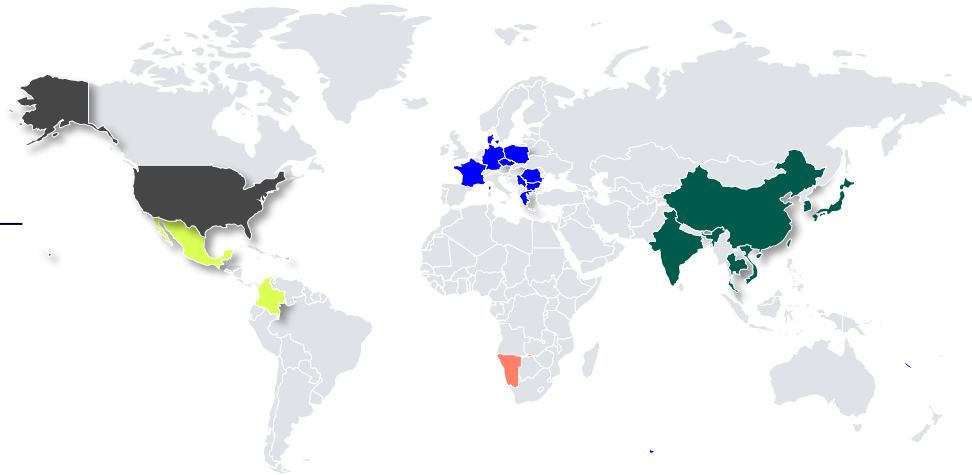
Namibia	Windhoek

South America

Mexico	Mexico City
	Puebla
	Querétaro
	San Lui Potosi
Colombia	Cali

North America

USA	Charleston
	Detroit
	Greenville
	Dallas



Portfolio as unusual.

SOFTWARE

- Android Automotive
- Business Intelligence
- Cloud Migration
- Cyber Security
- Data Analytics
- Enterprise Solutions
- Financial Systems
- IT-Architecture
- Certifications

TECHNOLOGY

- Autonomous Driving & ADAS
- Battery Technology
- Electric Powertrain
- Energy Solutions
- Industrialization
- Charging Infrastructure
- Operations Excellence
- Task Force Management
- Testing & Engineering

CONSULTING

- Agile Transformation
- Artificial Intelligence
- M&A Strategy
- Marketing & Design
- Sustainability
- Project Management
- "Organizational Strategy"
- Quality & Compliance
- Systems Engineering
- UX/UI Design
- Transformation

P3 advises leading international OEMs, suppliers, technology and insurance companies in the field of autonomous driving and autonomous mobility.

AUTONOMOUS MOBILITY /AS UNUSUAL

>9 years of international experience in autonomous driving consulting

>100 customers worldwide and more than 300 successful AD projects

>50 employees around the globe in the autonomous driving space

75% of the employees are engineers and software developers

We approach autonomous driving from many different perspectives. We understand the markets, know the players, but also have the technological know-how and the necessary software expertise.

Market & Strategy

- Go-to-market strategy
- Global market and competitive analysis for AD MaaS, TaaS & ownership
- MaaS & TaaS business model development incl. business case & TCO
- Competence analysis, assessment of “best-fit” partners
- (SDS) partnerships models and joint venture agreements
- AD shuttle / robotaxi and ADAS in-field testing & benchmarking

Technology & Regulation

- End-to-end architecture assessment and customization
- Cybersecurity, Functional Safety & SOTIF
- Regulation Implementation (AD SMS, SUMS & CSMS for SAE L2 to L4)
- Test Strategies & Management & Tool Confidence
- Sensor set evaluation and platform fortification strategies
- Support for Homologation (Type approval ODD and operation area)

Operations & Scaling

- AD Program Management incl. strategic setup, operations strategy, organizational build-up, project conduction & benchmarking
- Scaled Pilots: setup and management of runup schemes for AD pilot projects
- AD Product Lifecycle Management AD Logistics Concepts - Conceptualization of market-ready TaaS products

We help international ADAS players to draw strategic/technological implications and critical actions to succeed in the fast-growing ADAS Market.

Competencies	Exemplary challenges & questions	How we can help	
		Quick Check	*P3 Services*
Strategic (product) approach	• General tech stack strategy • Future-proofness & updateability • Navigating geo-political ambiguity	In a compact half-day workshop, we jointly address the most relevant questions for you, incl. - P3 POV impulse - Your top 3 challenges - Potential next steps	✓ (Product) strategy development incl. local adaptions ✓ Market studies with tech focus
Market positioning	• Positioning & aspiration (L2+ vs. L3) • Business & pricing model • Sustainable monetization		✓ Market & competitor intelligence ✓ Market models & revenue pool analysis ✓ Business & pricing models
Technology approach & product compliance	• Future-proof sensor sets & architectures • Realization of certain functionalities • (Local) regulations & compliance		✓ Tech roadmaps, scouting & strategy ✓ Tech deep-dives & assessments ✓ Regulation radar
Ecosystem coverage, value chains & partnering	• Make and/or buy & partnering • Managing risk & dependencies • Managing localization		✓ Value chain insights ✓ Partner & supplier scouting ✓ Technical Due Diligence
Organization, tools & Enablement	• Shortening timelines, adapting processes and achieving “China-Speed” • Establish organization & PMT to reflect SDV		✓ Project & process management ✓ Organization development ✓ Tools & process automation
Customer experience & trust	• Establishing customer trust • Achieving perceived customer benefit & high quality of service		✓ ADAS Benchmark & customer events ✓ Trust in autonomy – trust building ✓ UX Benchmarks & simulation/real-life studies

P3 Autonomous Mobility.

What’s new?

Let's start: P3 ADAS Market Insights Introduction.

3

ADAS Markets
(EU, USA, Asia)

14

ADAS Functions
(L2, L2+, L3)

19

Global
ADAS Players

This report offers insights into **SAE Level 2/2+ and Level 3 ADAS function packages** of global OEMs and their ADAS capabilities across global markets, with focus on driving functions, revealing the **strategies manufacturers are using to stay competitive in this fast-evolving market**. We focus on **North America**, **Asia** (China and Japan) and **Europe**

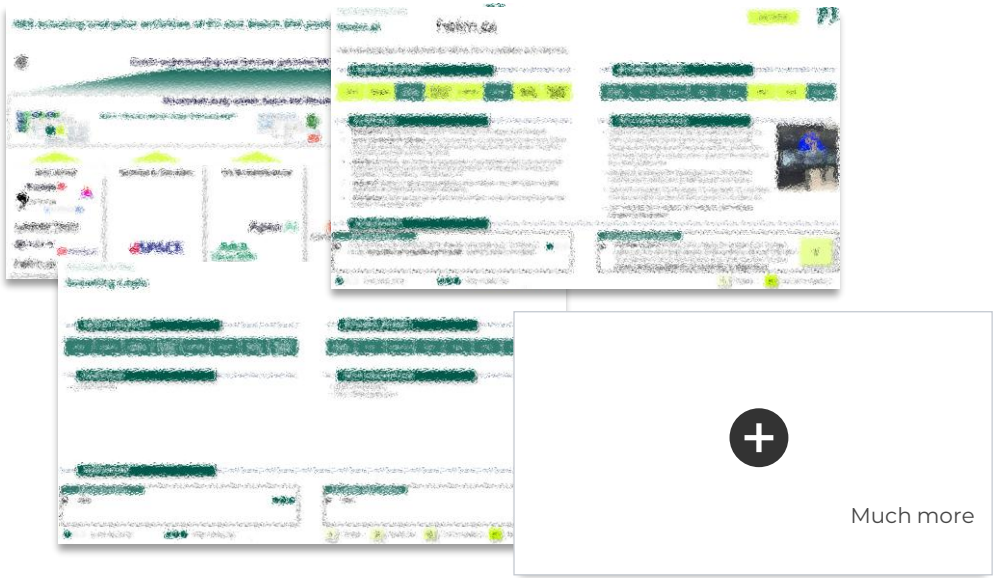
All **insights are based on publicly available sources**. Project knowledge or other **undisclosed information is not considered**.
Any image rights of logos or images shown here are held by the respective companies

CES 2026

Recap

We provide latest insights from CES 2026 – either in a personalized workshop or as a report. Feel free to reach out!

Sneak Peak What does the **CES 2026 Technology Insights Workshop/Report** look like?



Much more

- Discuss latest industry trends and implications (e.g. AD(AS), AI, SDV) on your business with our experts
- Interactive hypothesis workshops
- CES 2026 Technology Highlights Report with summaries of important highlights and product/feature launches
- **Feel free to reach out to us for more information…**

- **You will find us here:** LVCC, West Hall, Level 1, Booth 6719
- **When**: January 6-9, 2026

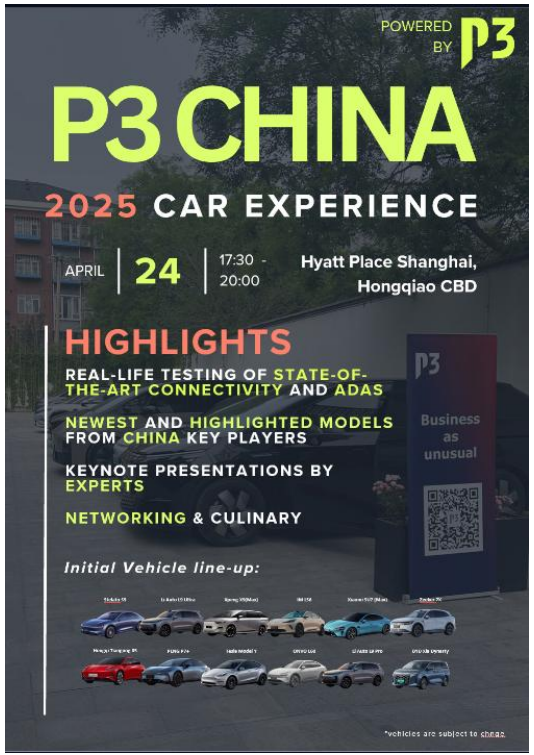
We are continuously conducting ADAS benchmarks worldwide.

Exemplary

P3 ADAS Benchmark Events

We test OEMs' ADAS capabilities using a **standardized methodology** combining **on-road testing** and **in-depth tech evaluations**. We engage with customers through **events and roadshows** featuring live demos, allowing us to efficiently analyze performance, UX, AI and the tech stack.

P3 China Car Experience 2025 showcased selected vehicles based on internal testing to highlight the smartification strengths of Chinese automakers



P3 China Car Experience 2025

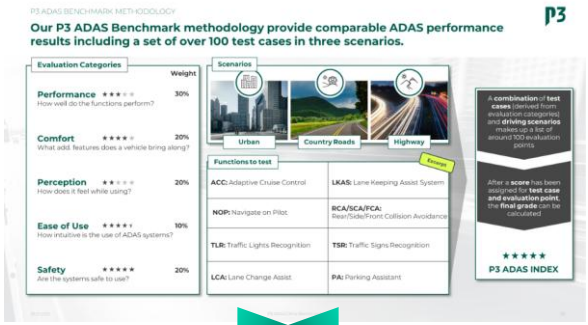
We offer extensive ADAS Benchmark Reports for the European & Chinese market based on objective and standardized performance evaluation & market analysis.

Two-Day-ADAS Benchmark Event

ADAS Benchmark | **ADAS Experience Drive**

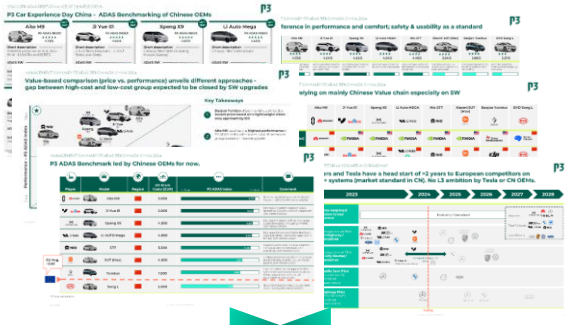
- ✓ **Extensive testing** of 8 – 10 **top notch vehicles with state-of-the-art ADAS Systems**
- ✓ **Conducted** in and for the **EU & CN market**

Standardized Benchmark Methodology



- ✓ **Over 100 standardized test cases** with objective scoring system
- ✓ All **ADAS functions** in function clusters **Driving, Parking, Guard** analyzed
- ✓ Testing in **urban**, **rural** and **highway scenarios**
- ✓ **Evaluation** in **five categories** (Performance, Perception, Comfort, Safety, Ease of Use)
- ✓ Result is **P3 ADAS Index** (1-5) overall and per category

Extensive ADAS Benchmark Report

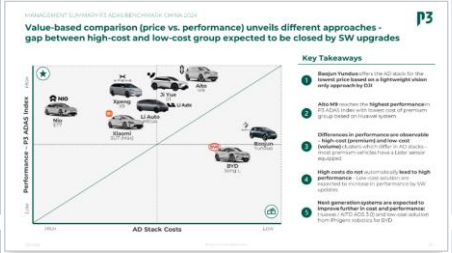


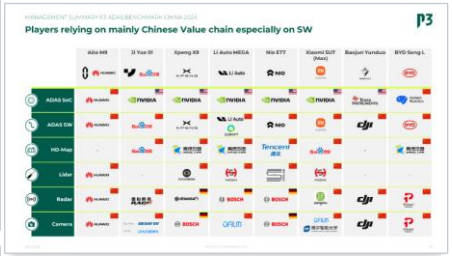
- ✓ Comprehensive **ADAS Market** & **Competitor** Overview
- ✓ **Report** as per **P3 Evaluation** incl. detailed insights on Performance in each category
- ✓ ADAS Stack **Supply Chain** & **Cost Analysis**
- ✓ Competitor **ADAS** Future **Roadmaps**
- ✓ **Detailed Vehicle Snapshots** incl. full ADAS Stack, ADAS functions, Field of Vision,...)
- ✓ **Safety** Assessment & **Regulation**
- ✓ **Energy Consumption** analysis per Stack
- ✓ Optional: **HMI & AI Benchmark Report**

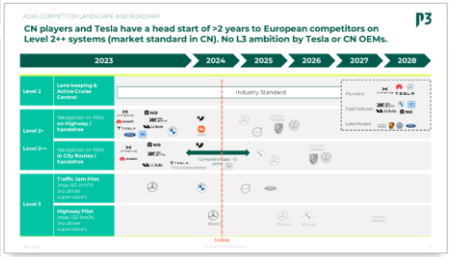
Our comprehensive ADAS Benchmark Report comprises 50-60 slides with in-depth insights into the latest ADAS technologies.

Sneak Peak

What does the **ADAS Benchmark Report** look like?







Much more

Pricing of benchmark reports.

ADAS Benchmark Report can also be requested for ADAS Benchmark Event China 2.0 in 2025

Focus on EU 2025 Event

ADAS Benchmark Report

Unit price*	**Upon request**
Bundle price	**Upon request**

Includes:
- Comprehensive ADAS Market & Competitor Overview
- Report as per P3 evaluation incl. detailed insights on performance in each category
- ADAS stack supply chain & cost analysis
- Competitor future ADAS roadmaps
- Detailed vehicle snapshots incl. full ADAS stack, ADAS functions, ...)
- Safety assessment & regulation
- Energy consumption analysis per stack

Optional: ***HMI & AI Benchmark Report***

Unit price	**Upon request**

Includes:
- Assessment of user needs based on user journey
- Quantitative assessment of functionalities & performance of selected highlight areas
- Qualitative usability evaluation for most important use cases
- Benchmark of in-vehicle AI assistants and tools

Optional: ***Workshops***

Unit price	**Upon request**

Potential contents:
- Derive of impacts/implications for your global ADAS strategy
- Identify areas where competitors are ahead and where you have a competitive advantage
- Identify challenges in homologation and compliance for different markets
- Discuss data-driven insights from ADAS usage to improve user experience and safety
- Adapt of the benchmark framework based on your specific needs and development of a customized ADAS index

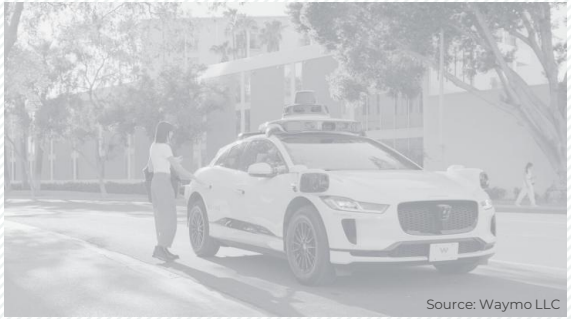
⊕ We offer the option of adding your own or desired vehicles to our benchmarks for an additional charge. Feel free to reach out.

*Unit Price for EU report or CN report

P3 Understanding of ADAS.

While the AD revolution is still waiting for major breakthroughs, short term focus shifts to ADAS & supporting technologies.

Proof of Competence achieved for Robotaxi (Level 4) but not yet profitable


Source: Waymo LLC

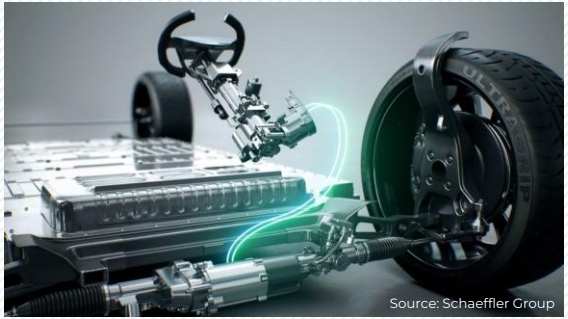
Progress regarding scalability and profitability of AD L4 MaaS especially in USA and China

New ADAS functions (Level 2/2+ hands-free) will deliver real customer value


Source: BMW Group

ADAS L2/L2+/L3 will grow strong and gain higher penetration

AD / ADAS function will power development of new technologies (e.g. Steer-by-Wire, new HMI concepts)


Source: Schaeffler Group

Technology Ecosystem is emerging along the ADAS value chain

FOCUS

Technical differentiation for different automation levels

CHALLENGES
- Homologation & certification
- Quality of service
- Safety & reliability issues

Main responsibility switches to system

Focus

Overview of automation levels

	Driver 1	Driver 2	Driver 2+	OEM 3	OEM 4	OEM 5
Automation Level	 Driver Assistance **Hands on Eyes on**	 Driver Assistance **Hands on Eyes on**	*Not an official SAE Level*  Partial Automation **Hands temp. off Eyes on**	 Cond. Automation **Hands off Eyes off**	 High Automation **Hands off Mind off**	 Full Automation **Driver off**
Definition of assistance level *Based on SAE & adapted by P3*	**Longitudinal or lateral guidance** • One-dimensional assistance • Full responsibility at driver	**Longitudinal and lateral guidance** • Discontinuous two-dimensional assistance • Full responsibility at driver	**Longitudinal and lateral guidance** • Hands free driving in suitable conditions • Driver must be aware and be ready to intervene	**Longitudinal and Lateral control by function** • System handles driving tasks under specific conditions • Driver must be ready to take control when needed • Driver allowed to focus on side activities	**Full control by system in limited ODD** • System performing all driving tasks in specific ODD • Passenger aren't required to monitor the vehicle and don't need to take control	**Full control by system everywhere** • System performing all driving tasks under all roadway and environmental conditions • No Driver needed
Exemplary functions	 **ACC**	 **LKA and ACC**	 **Tesla Autopilot**	 **Highway Pilot/ Traffic Jam Pilot**	 **City Pilot L4, Parking Pilot L4**	 **Self-driving Mobility Services**

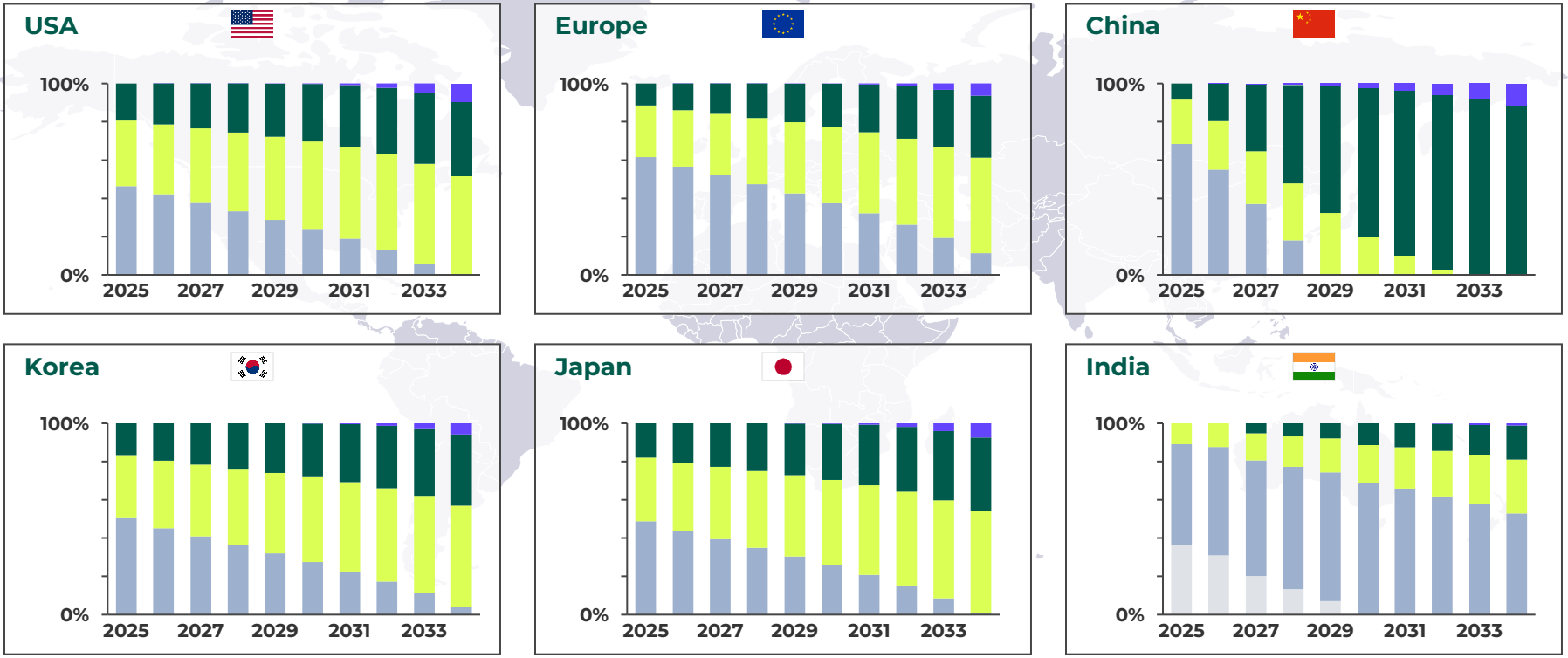
ACC = Automated cruise control, LKA = Lane keeping assist, ODD = Operational Design Domain

UPDATE

ADAS becomes standard, while the fast-growing ADAS market provides opportunities to be taken

Exemplary P3 market model base case – numbers & fleet development upon request

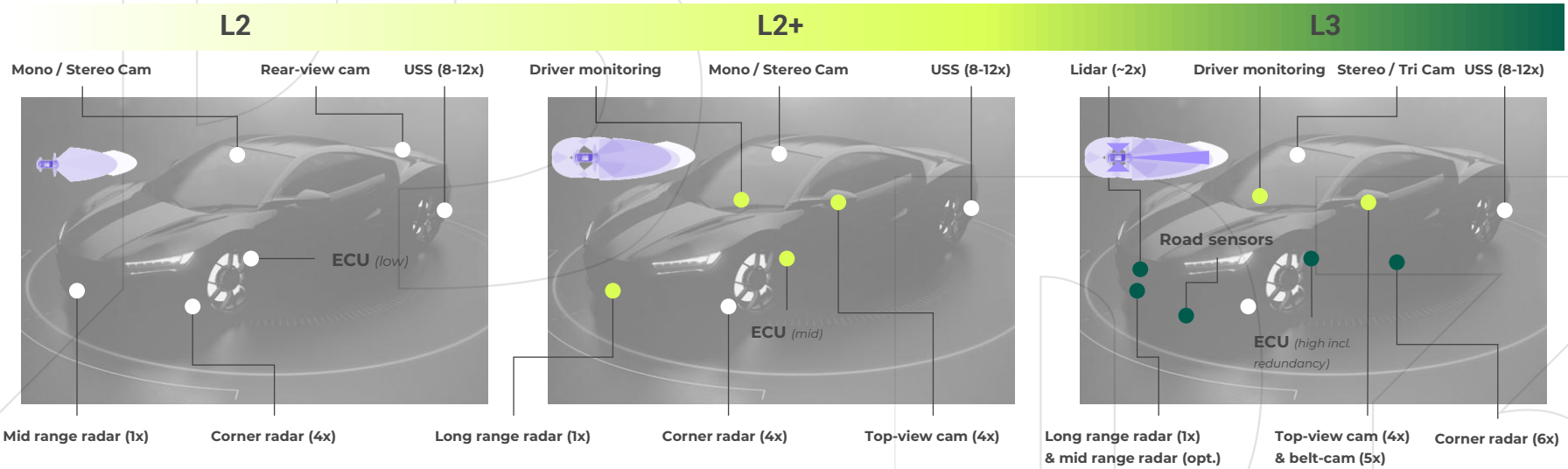
Relative market share of each ADAS segment for 2025 & 2030 vehicle sales



Exemplary

Increasing automation levels and new functions require a multitude of new hardware components and software.

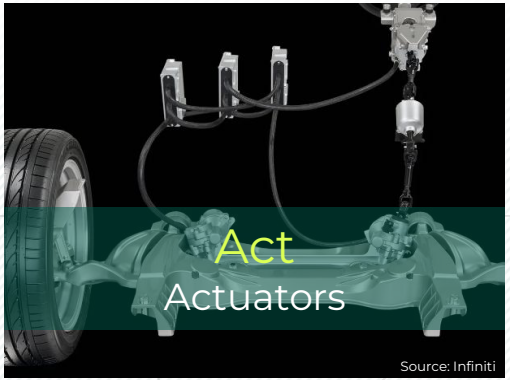
Related HW setup



The challenge for OEMs lies in **balancing the increased costs** associated with the advanced hardware required for higher autonomy while ensuring **pricing stays attractive to end-users** and justifies the **added customer value.**

○ Components for L2 ● Additional components for L2+ ● Additional components for L3

Developments and technology trends happen across whole sense-plan-act framework which P3 monitors closely



Radars | **Lidars** | **Cameras** | **ECU** | **SoC** | **Steer-by-wire** | **Brake-by-wire**

Market development hypothesis

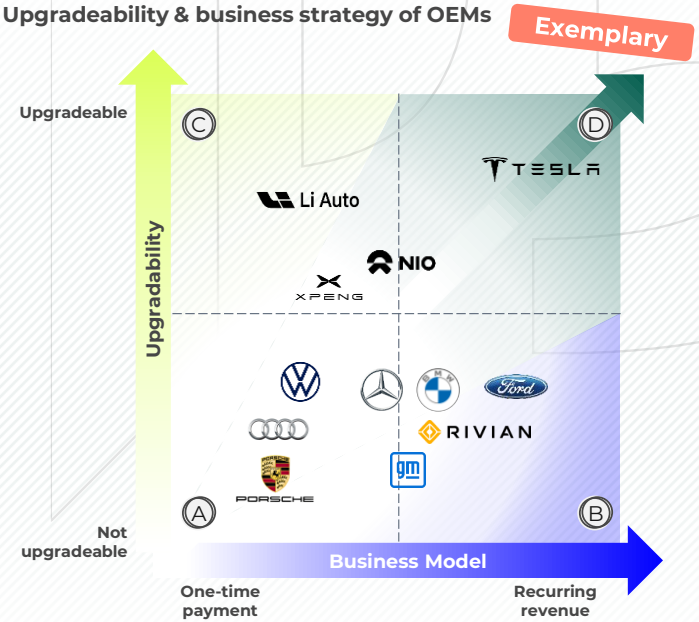
- **Camera**: **Strong growth expected** due to automation. Product will be highly commoditized
- **Radar**: **4D radars**, combined with cameras, will be the leading sensor modality for all <SAE L3 applications.
- **LiDAR**: The advancements in imaging radar performance, **need for LiDAR being reassessed** by industry players.

- Intelligence moves from sensor towards centralized high-performance **ECUs**.
- **Reliable functions required** for higher automation levels that is mostly achieved through **redundancy**.
- AI-driven development and training methods for SDS SW require high performance **SoC and ECU**.

- European OEMs are starting to **implement Brake-by-Wire/ (front-axle) Steer-by-Wire systems (e.g., Mercedes-Benz in 2026)**.
- Brake-by-Wire technology is **pushed** by **premium European OEMs**.
- Steer-by-wire technology **reduces the mechanical complexity** in back wheel steering leading to more widespread adoption.

ADAS is increasingly seen as a differentiating factor that is gaining in importance and, depending on the approach, will also enable new business models.

Upgradeability & business strategy of OEMs



A Classic package approach

- Currently still predominant strategy for ADAS functions
- One-time purchase of ADAS functions with unlimited access for customer leads to direct one-time revenue
- Generally higher portfolio variation & complexity due to specific HW/SW sets for cost optimization

B Function subscriptions approach

- Initial purchase in combination with subscription based-model after defined use time or subscription only model leads to recurring revenue for OEMs
- Potential increased initial cost for OEMs to equip vehicles with necessary hardware for later function activation, but reduced portfolio complexity

C Upgradeable package approach

- Extensive hardware setup, enabling future upgrades in functionalities and automation levels Potential for future revenue by already sold vehicle by software w/o further hardware investment

D SW-driven upgrade & subscriptions approach

- Future-proof hardware setup enabling future upgrades through software in combination with on-demand subscription model enables recurring revenue and future one-time purchases with already sold vehicles without hardware adaption

The first players are already working on providing lasting **customer value and brand differentiation through ADAS**. This is both a challenge and an opportunity that requires a considered approach on the **business model and technology side** (upgradeability).

P3 Approach.

P3 Approach & Methodology

Focus on ADAS Driving & Parking Functions

Steps of P3 Approach	Guiding Questions
1 Analysis and benchmark of the ADAS function portfolio from different OEM	Which ADAS function packages does the OEM offer? What ADAS functions do the function packages include?
2 Baselining ADAS function portfolios of OEM in the main markets EU, China and USA	Which of the ADAS functions are similarly offered by several OEM?
3 Clustering of the baselined ADAS functions	In which categories should the ADAS functions be clustered?
4 Allocation of the functions into the ODD/operational area for each player and market	Which ADAS functions does P3 consider to be offered and ready to use in which ODD (urban, highway, rural) in main markets?

Outcome: Generic ADAS function list applicable for every OEM adapted to the function portfolio and availability in the main global markets.

P3 Definition of ADAS Level 2/2+ Function Packages (I/II)

Focus on ADAS Driving & Parking Functions

Area	Adaptive Cruise Control (ACC)	Lane Keeping Assist (LKA)	Lane Change Assist (LCA)
SAE Level	Categorization to L2 & L2+*, depends on required hands-on or temp. hands-off availability under suitable conditions (e.g., on highway)		L2: Hands-on required L2+*: Enables the driver to trigger the lane change and take off hands during maneuver
Highway	ACC maintains a constant speed and safe following distance.	LKA provides additional safety by keeping the vehicle centered in its lane, especially at higher speeds.	LCA ensures safe lane changes at high speeds by monitoring fast-approaching vehicles, warning the driver, and potentially intervening to prevent collisions.
Rural			LCA helps drivers safely change lanes at higher speeds by monitoring blind spots and traffic.
Urban	ACC handles frequent stop-and-go traffic by automatically braking and accelerating.	LKA is used for navigating tight, congested streets by preventing unintentional lane departure.	LCA helps drivers safely change lanes by monitoring blind spots and traffic, especially in heavy traffic.

* No automation level officially defined by SAE

P3 Definition of ADAS Level 2/2+ Function Packages (II/II)

Focus on ADAS Driving & Parking Functions

Area	Traffic Sign Assist (TSA)	Traffic Light Assist (TLA)	Navigation on Pilot (NoP)
SAE Level	L2 functions due to independency from hands-on/hands-off mode		SAE L2+* if hands-off is enabled under suitable conditions (e.g. highway)
Highway	Recognizes and displays traffic signs, such as speed limits.	Traffic lights are less common on highways. However, in some countries, there are highway interchanges where traffic lights are installed.	Handles highway entry and exit ramps autonomously, ensuring smooth transition. Executes safe lane changes by monitoring traffic.
Rural		Informs the driver about the status of traffic lights to help navigate busy intersections safely and efficiently.	Navigates complex intersections, identifies pedestrians, cyclists and other objects.
Urban	Informs the driver about current speed limits, entry restrictions, and other regulatory signs.		Navigates complex intersections, identifies pedestrians and cyclists, manages tight spaces and heavy traffic.

* No automation level officially defined by SAE

P3 Definition of ADAS Level 3 Function Packages

Focus on ADAS Driving & Parking Functions

	Traffic Jam Pilot	Highway Pilot	Urban Pilot
Definition	Autonomous driving system for congested traffic conditions at lower speeds, only on highway. It manages acceleration, braking, and steering without driver intervention.	Enables autonomous driving on highways at higher speeds, operating under certain conditions (e.g. clear road markings or moderate traffic).	Controls the vehicle in city environments, handling tasks like navigating intersections, detecting pedestrians, and obeying traffic signals.
Level 2/2+ Functions included	• Lane Keeping Assist • Adaptive Cruise Control	• Lane Change Assist • Lane Keeping Assist • Adaptive Cruise Control • Traffic Sign Assist	• Lane Change Assist • Lane Keeping Assist • Adaptive Cruise Control • Traffic Sign Assist • Traffic Light Assist

P3 Definition of ADAS Parking Functions

Focus on ADAS Driving & Parking Functions

	 **Parking** (forward, reverse etc.)	 **Remote Parking**	 **Trained Parking**	 **Reverse Assist**	 **Maneuver Assist**
SAE Level	L2 (L2+* if hands-off is possible)	L3 or L4	L2+* if hands-off is possible		
Definition	Vehicle is able to drive and back automated into a parking space, typically used for perpendicular or angled parking.	Vehicle parks itself while being controlled externally by the driver using a smartphone app, key fob, or another remote interface. The system autonomously handles actuators, allowing the driver to park or retrieve the vehicle from a short distance without being inside it.	Vehicle is able to learn and repeat a specific parking maneuver based on previous driver inputs. Vehicle records the exact path taken to park in a particular location (e.g. home garage or designated parking spot).	Vehicle reverses by tracking and replicating its previous path or by actively detecting obstacles and adjusting its trajectory. The vehicle is able to back up without driver intervention or with minimal input.	Vehicle navigates low-speed, complex driving situations, such as tight turns, narrow passages, or obstacle avoidance in confined spaces. This feature enhances vehicle control and reduces driver effort in challenging maneuvering scenarios.

* No automation level officially defined by SAE

ADAS One Pager Structure

Consideration of most advanced ADAS vehicle

Overview of the availability of L2/L2+ and L3 ADAS function packages in different ODD

Achieved SAE-Level

Urban | SAE-Level 2 | Rural | SAE-Level 2+ | Highway | SAE-Level 3

ADAS Function & Supplier Overview*

Function	ACC	LKA	LCA	TLR	NoP	Traffic Jam Pilot
Urban			-		-	-
Rural			-		-	
Highway						

Parking Functions				
Automated Parking	Remote Parking	Trained Parking	Reverse Assist	Maneuver Assist

Available | – Not available | N/A

Overview of the existing parking functions

ADAS Snapshot

- The L2 **BMW Driving Assistant Professional** is available in many BMW models and is often offered as part of a larger package that includes several driver assistance systems.
- The **Hands-Off Driving Feature** is available on highways **up to 130 km/h (L2+)** with triggered lane changes.
- **BMW Personal Pilot L3** function can be ordered for the **BMW** highways with barriers separating traffic, for **up to 60km/h. E** to **detect emergency vehicles**.
- L3 function will be offered exclu in **Germany** priced at 6,
- The BMW P conjunction with the relevant BMW Connected

Specific information regarding ADAS functions

Sensor Setup***

- 6x cameras
- 7x radars
- 2x lidar
- ~2x mic.

Sensor Setup of the most advanced ADAS vehicle

Market Availability

L2 | L2 | L2 | L3

SAE-Level availability in the global market (focus on EU, USA, China / add. markets in case of ADAS feature highlights)

Supplier Overview**

- Camera
- Radar
- LiDAR
- ADAS SW

- Upo quest -

Overview on relevant components and the related suppliers for ADAS

* Function description on Slide 22-25

** Based on Desk Research. Not considering specific markets Non exhaustive

*** Several USS, not considered in Sensor Setup due to SotA

ADAS.EU Players

ADAS Status, Evaluation & Latest News

Source: BMW Group

ADAS EU | BMW

UPDATE

Consideration of most advanced ADAS vehicle

Urban | SAE-Level 2+ | Rural | SAE-Level 2+ | Highway | SAE-Level 3

ADAS Function Overview*

	L2/L2+ Functions						L3 Functions			Parking Functions				
Function	ACC	LKA	LCA	TSR	TLR	NoP	Highway Pilot	Urban Pilot	Traffic Jam Pilot	Automated Parking	Remote Parking	Trained Parking	Reverse Assist	Maneuver Assist
Urban			-			CN		-						
Rural			-			CN			-					
Highway														

Available | - Not available | N/A

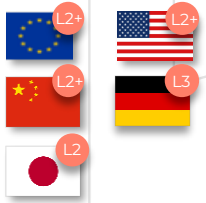
ADAS Snapshot

- The L2 **BMW Driving Assistant Professional** is available in many BMW models and is often offered as part of a larger package that includes several driver assistance systems.
- The **Hands-Off Driving Feature** is available on highways **up to 130 km/h (L2+)** with triggered lane changes.
- The L2 and L2+ features are easily **activated with one single button on the steering wheel** and **deactivated via braking or "over-steering"**.
- **BMW Personal Pilot L3** function can be ordered for the **BMW 7 Series. With the lifecycle impulse (LCI) of the BMW 7 Series not available anymore from end of April 2026 onwards.**
- The **BMW Panoramic iDrive**, debuting in the Neue Klasse late 2025, is a next-generation display and control system combining panoramic windshield projection, central touch display, 3D HUD, and haptic steering for intuitive, personalized interaction.

Sensor Setup***

- 6x cameras
- 7x radars
- 2x lidar
- ~2x mic.

Market Availability



Supplier Overview**

- Camera
- Radar
- LiDAR
- ADAS SW
- SoC/ECU
- HD Map

- Upon request -

* Function description on Slide 22-25

** Based on Desk Research. Not considering specific markets Non exhaustive

*** Several USS, not considered in Sensor Setup due to SotA

ADAS EU | Mercedes-Benz

UPDATE

Consideration of most advanced ADAS vehicle

Urban	SAE-Level 2+	Rural	SAE-Level 2+	Highway	SAE-Level 3

ADAS Function Overview*

	L2/L2+ Functions						L3 Functions			Parking Functions				
Function	ACC	LKA	LCA	TSR	TLR	NoP	Highway Pilot	Urban Pilot	Traffic Jam Pilot	Automated Parking	Remote Parking	Trained Parking	Reverse Assist	Maneuver Assist
Urban			-			CN		-						-
Rural			-			CN			-					
Highway														

Available – Not available N/A

ADAS Snapshot

- The L3 System **“DRIVE PILOT”** was available in the U.S. market (Nevada) as an option for model year 2024 Mercedes-Benz **S-Class** and **EQS Sedan** models.
- **DRIVE PILOT** takes over the dynamic driving task on German highways. Once conditions are suitable, the system indicates availability on the control buttons. Microphones are used to detect signals from emergency vehicles. Acoustic road moisture sensor is used to measure the sound level of the spray from the tire on wet roads, to determine impacts on the other sensors.
- The digital **HD map** provides **a three-dimensional image** of the road and the surroundings.
- **DRIVE PILOT** function can be ordered for the **S-Class** and **EQS Sedan models. With the lifecycle impulse (LCI) of the S-Class not available anymore from end of January 2026 onwards. Mercedes-Benz moves back to L2++.**

Sensor Setup***

- 7x cameras
- 5x radars
- 1x lidar
- ~2x mic.

Market Availability

Supplier Overview**

- Camera
- Radar
- LiDAR
- ADAS SW
- SoC/ECU
- HD Map

- Upon request -

* Function description on Slide 22-25

** Based on Desk Research. Not considering specific markets Non exhaustive

*** Several USS, not considered in Sensor Setup due to SotA

ADAS EU | Volkswagen

UPDATE

Consideration of most advanced ADAS vehicle

Urban	SAE-Level 2+	Rural	SAE-Level 2+	Highway	SAE-Level 2+

ADAS Function Overview*

	L2/L2+ Functions						L3 Functions			Parking Functions				
Function	ACC	LKA	LCA	TSR	TLR	NoP	Highway Pilot	Urban Pilot	Traffic Jam Pilot	Automated Parking	Remote Parking	Trained Parking	Reverse Assist	Maneuver Assist
Urban			-			CN		-					-	-
Rural			-			CN			-					
Highway						CN	-		-					

Available | – Not available | N/A

ADAS Snapshot

- The **VW "Travel Assist 2.5"** can be activated via the steering wheel and is available **in ID.4, ID.5, ID.7** and the **ID.BUZZ** as well as in **MQB/MLB-based vehicles (e.g., Passat, Tiguan, Touareg)**
- **Adaptive Cruise Control** is active from 30 km/h, **Lane Keeping Assist** from 65 km/h, and **Lane Change Assist** can perform lane changes at speeds from 90 km/h.
- The optional **hazard warning system** warns you of roadworks or approaching emergency vehicles.
- **Traffic Light Recognition** available with the **Travel Assist 3.0** (2026).
- **The drowsiness detection and emergency assist system** automatically alerts unfocused drivers via the instrument cluster and can autonomously stop the vehicle when needed via lane change. **The emergency assist is not available yet in current VW vehicle models.**
- The **ADAS stack for ID.7** is estimated to be priced around €1,990 for end-customers.
- In China, VW is partnering with **ZYT** where they offer **L2+ Navigation on Autopilot (NOA)** features for **highway** and **urban areas**.

Sensor Setup***

- 5x cameras
- 3x radars
- 0x lidar
- 0x mic.

Market Availability

Supplier Overview**

- Camera
- Radar
- LiDAR
- ADAS SW
- SoC/ECU
- HD Map

- Upon request -

* Function description on Slide 22-25

** Based on Desk Research. Not considering specific markets Non exhaustive

*** Several USS, not considered in Sensor Setup due to SotA

P3 ADAS MARKET INSIGHTS

ADAS EU | Renault

RENAULT

NEW

Consideration of most advanced ADAS vehicle

Urban	SAE-Level 2	Rural	SAE-Level 2	Highway	SAE-Level 2

ADAS Function Overview*

	L2/L2+ Functions						L3 Functions			Parking Functions				
Function	ACC	LKA	LCA	TSR	TLR	NoP	Highway Pilot	Urban Pilot	Traffic Jam Pilot	Automated Parking	Remote Parking	Trained Parking	Reverse Assist	Maneuver Assist
Urban	■	■	-	■	-	-	▨	-	▨	■	-	-	-	-
Rural	■	■	-	■	-	-	▨	▨	-					
Highway	■	■	-	■	-	-	-	▨	-					

■ Available - Not available ▨ N/A

ADAS Snapshot

- **Renault Rafale** and **Scenic E-Tech** are the primary models featuring the **latest ADAS technology**, called **Active Driver Assist**.
- Key features include **ACC with Stop & Go**, **LCA**, and **TSR**.
- Standard parking offerings include **Automated Parking, 360° Vision, and Rear Active Emergency Braking**.
- Renault prioritizes **accessible Level 2/2+ tech** for the mass market **rather than high-cost Level 3 systems**.
- Advanced ADAS is **included in the base price** for Rafale and Scenic, but requires a **€2,600 surcharge** for Megane and Clio.
- Future development is driven by the **Ampere division** through a **strategic SDV partnership** with **Qualcomm and Google**.

Sensor Setup***

- 5x cameras
- 3x radars
- 0x lidar
- 0x mic.

Market Availability

L2 L2

Supplier Overview**

- Camera
- Radar
- LiDAR
- ADAS SW
- SoC/ECU
- HD Map

- Upon request -

* Function description on Slide 22-25

** Based on Desk Research. Not considering specific markets Non exhaustive

*** Several USS, not considered in Sensor Setup due to SotA

ADAS EU

P3 Evaluation

BMW enforces its localization strategy in China with the technology partnership with Momenta. With the **DCAS approval of the L2 highway feature in new iX3**, **market entry** in further UNECE countries with **less regulatory barriers**.

Strategic decision from BMW to remove Personal Pilot L3 in facelift of **7 Series** underlines low take-rate and obviously missing customer benefit.

In the P3 ADAS Benchmark EU 2025, Mercedes-Benz EQE showed **well-working L2 function** with **high availability on highways and rural roads** that also provides acceptable support in urban areas.

Mercedes enforces its localization strategy in China with the new CLA where ADAS features are developed together with Momenta where for L4 robotaxi services partnerships with NVIDIA and Uber are leveraged.

Strategic decision from Mercedes to remove L3 Drive Pilot in new S-Class underlines low take-rate and obviously missing customer benefit.

Update

Volkswagen's ADAS strategy is built on a combination of **internal development through Cariad** and **strategic partnerships with industry leaders** while also **focusing on localization** for specific regions like China.

With the self-developed SoC together with Horizon Robotics, VW aims for strengthening its market position in China as well as adapting the SW/HW to Chinese traffic conditions for autonomous driving. The system performance will show if VW can catch up with competitors.

Latest news

BMW announced to remove Personal Pilot L3 (SAE L3) with the next LCI of BMW 7 series end of April 2026 .
(24.02.2026)

BMW and Momenta started testing activities for next-gen ADAS for China which will be available in the Chinese version of the iX3.
(18.11.2025)

Update

Mercedes announced the partnership with NVIDIA and Uber for developing S-Class robotaxis.
(30.01.2026)

Mercedes announced with new S-Class to offer MB.Drive Assist Pro (SAE L2++) instead of Drive Pilot (SAE L3).
(29.01.2025)

Mercedes announced to launch and offer L4-ready S-class in cooperation with Momenta for mobility provider (e.g. Lumo) in Abu-Dhabi after initial test phase.
(09.12.2025)

Mercedes announced to launch the Drive Assist Pro (L2++) in the new CLA in China in 2025 and in 2026 in the USA.
(01.10.2025)

Update

VW announced that Qualcomm will be nominated as main chip supplier for among others ADAS systems.
(08.01.2026)

VW announced to develop SoC for automated driving applications together with joint venture partner Horizon Robotics for Chinese vehicle models.
(05.11.2025)

Update

ADAS EU

NEW

P3 Evaluation

Source: Renault

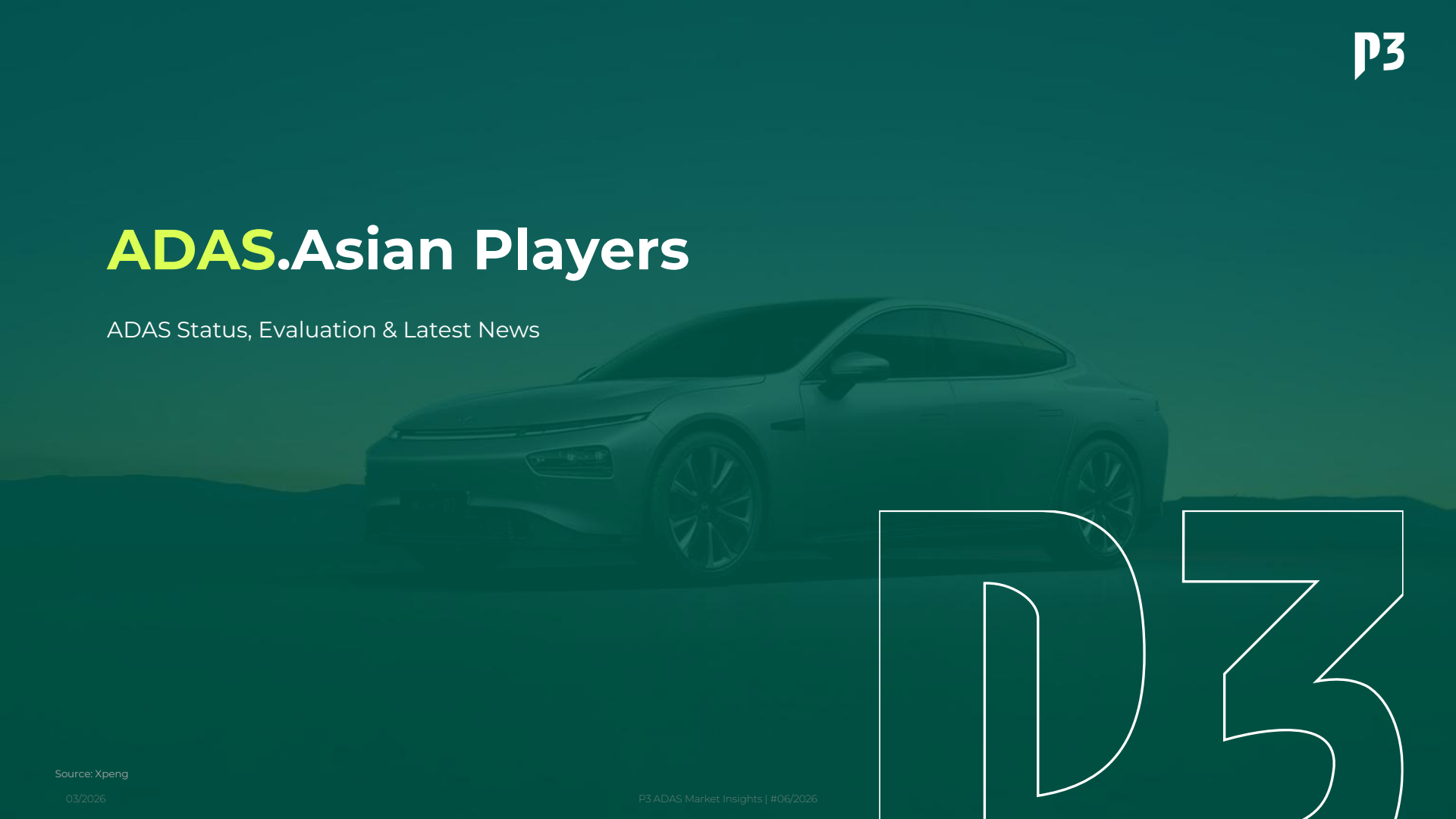
Renault focuses on **democratizing Level 2/2+ functions for the mass market**, prioritizing high-quality assistance over expensive Level 3 systems. To drive this, the **Ampere division** is developing a **centralized SDV platform** in strategic **partnership with Qualcomm**, enabling advanced ADAS features and continuous OTA updates.

Latest news

Renault announced that its software unit, Ampere, will utilize the Snapdragon Ride Platform as an open and scalable foundation for its next-generation ADAS. (31.03.2025)

ADAS.Asian Players

ADAS Status, Evaluation & Latest News



Source: Xpeng

ADAS Asia | Xiaomi

UPDATE

Consideration of most advanced ADAS vehicle

Urban	SAE-Level 2	Rural	SAE-Level 2	Highway	SAE-Level 2+

ADAS Function Overview*

	L2/L2+ Functions						L3 Functions			Parking Functions				
Function	ACC	LKA	LCA	TSR	TLR	NoP	Highway Pilot	Urban Pilot	Traffic Jam Pilot	Automated Parking[1]	Remote Parking	Trained Parking[1]	Reverse Assist	Maneuver Assist
Urban						CN		-	-					
Rural						CN			-			-	-	-
Highway							-		-					

Available – Not available N/A

ADAS Snapshot

- Xiaomi Pilot Pro, an in-house developed ADAS system, is available on the Xiaomi SU7 with **NoP activation via steering wheel button** (but limited availability in complex city situations). The **ADAS stack** is included in the vehicle price and comes as standard.
- Some insights from P3 ADAS Benchmark Events (China) in 2024 show:
  - The system faces **challenges with lane control**, and it lacks comfort features such as FCA distance warnings.
  - It struggles with **ACC and LKA disengagements**, along with limited recognition of traffic signs, leading to frequent interventions for lane control.
- Introduction of the new **electric SUV Xiaomi YU7** in June 2025 with the new 700 TOPS **NVIDIA Thor Chipset**.
- Xiaomi plans to enter the **European market** with its models **in 2027**.
- Rolling out with the **HyperOS 1.11 OTA update** at the end of 2025, Xiaomi's **Hyper Autonomous Driving (HAD)** uses **end-to-end AI** to enable smoother, human-like driving and improved emergency steering across the SU7 Pro, Max, Ultra, and YU7 models.

Sensor Setup***

- 11x cameras
- 1x radars
- 1x lidar
- 0x mic.

Market Availability

Supplier Overview**

- Camera
- Radar
- LiDAR
- ADAS SW
- SoC/ECU
- HD Map

- Upon request -

[1] Chinese players usually rely on Parking Space to Parking Space functionality with automated parking

* Function description on Slide 22-25

** Based on Desk Research. Not considering specific markets Non exhaustive

*** Several USS, not considered in Sensor Setup due to SotA

ADAS Asia | XPENG

UPDATE

Consideration of most advanced ADAS vehicle

Urban	SAE-Level 2+	Rural	SAE-Level 2+	Highway	SAE-Level 2+

ADAS Function Overview*

	L2/L2+ Functions						L3 Functions			Parking Functions				
Function	ACC	LKA	LCA	TSR	TLR	NoP	Highway Pilot	Urban Pilot	Traffic Jam Pilot	Automated Parking[1]	Remote Parking	Trained Parking[1]	Reverse Assist	Maneuver Assist
Urban						CN		-	-					
Rural						CN			-				-	-
Highway							-		-					

Available – Not available N/A

ADAS Snapshot

- Xpeng's "XNGP" (Xpeng Navigation Guided Pilot) ADAS system is available on the **P5, P7, P7+, G9, G6 and X9 models**, emphasizing **Xpeng's proprietary AD software** as a key market differentiator.
- The **ADAS stack** is included in the vehicle price and comes as standard.
- The **AI Valet Driving feature in XOS 5.1.0 can memorize and customize up to 10 driving routes of up to 100 km** each during manual driving, functioning independently of XNGP's availability.
- L2+ system includes **Xpeng's in-house developed mid-range LiDARs** and a user-friendly HMI that supports **lane change visualizations** and **NoP functionalities** in various driving scenarios.
- Transition to in-house **Turing AI chips** (up to **2,250 TOPS**), providing compute power for flagship models like the **P7+** and the new **GX SUV** to support future **Level 3 Highway Pilot.**
- **Flagship SUV GX SUV** built on the **SEPA 3.0 Physical AI architecture**, featuring AI-enabled chassis with **steer-by-wire** and **rear-wheel steering** to enhance high-speed ADAS stability and urban maneuverability.

[1] Chinese players usually rely on Parking Space to Parking Space functionality with automated parking

Sensor Setup***

- 11x cameras
- 5x radars
- 2x lidar
- 0x mic.

Market Availability

L2 L2 L2+

Supplier Overview**

- Camera
- Radar
- LiDAR
- ADAS SW
- SoC/ECU
- HD Map

- Upon request -

* Function description on Slide 22-25

** Based on Desk Research. Not considering specific markets Non exhaustive

*** Several USS, not considered in Sensor Setup due to SotA

ADAS Asia | Li Auto

Li Auto

UPDATE

Consideration of most advanced ADAS vehicle

P3

Urban	SAE-Level 2+	Rural	SAE-Level 2+	Highway	SAE-Level 2+

ADAS Function Overview*

	L2/L2+ Functions						L3 Functions			Parking Functions				
Function	ACC	LKA	LCA	TSR	TLR	NoP	Highway Pilot	Urban Pilot	Traffic Jam Pilot	Automated Parking[1]	Remote Parking	Trained Parking[1]	Reverse Assist	Maneuver Assist
Urban						-		-	-					
Rural						-			-				-	-
Highway							-		-					

Available – Not available N/A

ADAS Snapshot

- The most advanced ADAS system from Li Auto **Li AD Max** is installed in the flagship vehicle **Li L9**, in the **Max versions Li L6, Li L7** and **Li L8** as well as in the **Li MEGA**.
- The **ADAS stack** is included in the vehicle price and comes as standard.
- The system features **fast processing of sensor data** through the use of **two NVIDIA Orin-X** chips.
- With the introduction of the **MindVLA architecture** in the **2025 models**, such as the updated Li L6, the system is supported by the new **NVIDIA Thor-U chip** for enhanced processing performance.
- The full-scenario **Navigation on Autopilot (NOA)** system now offers **nationwide coverage** across highways, urban ring roads, city streets and campus roads.
- **Li Auto L Series which entered series production** is equipped with **city Navigation on Autopilot (NOA) solution from Qcraft (QCraft 2.0)** incorporates a Horizon Robotics Journey 6M chip.

Sensor Setup***

- 11x cameras
- 1x radars
- 1x lidar
- 0x mic.

Market Availability

Supplier Overview**

- Camera
- Radar
- LiDAR
- ADAS SW
- SoC/ECU
- HD Map

- Upon request -

[1] Chinese players usually rely on Parking Space to Parking Space functionality with automated parking

* Function description on Slide 22-25

** Based on Desk Research. Not considering specific markets Non exhaustive

*** Several USS, not considered in Sensor Setup due to SotA

ADAS Asia | Seres (Aito)

UPDATE

Consideration of most advanced ADAS vehicle

Urban	SAE-Level 2+	Rural	SAE-Level 2+	Highway	SAE-Level 2+

ADAS Function & Supplier Overview*

	L2/L2+ Functions						L3 Functions			Parking Functions				
Function	ACC	LKA	LCA	TSR	TLR	NoP	Highway Pilot	Urban Pilot	Traffic Jam Pilot	Automated Parking[1]	Remote Parking	Trained Parking[1]	Reverse Assist	Maneuver Assist
Urban						CN		CN	-			CN	CN	CN
Rural						CN			-					
Highway							CN		-					

Available | – Not available | N/A

ADAS Snapshot

- The **ADAS stack** is included in the vehicle price and comes as standard.
- The NoP system, with **its smooth, announced maneuvers, builds high trust**. Minor issues include occasional manual overtaking and aggressive lane-changing in dense traffic.
- In China, the **Aito M5 Ultra** was introduced in **April 2025 with ADS 3.3** as well as the **facelift of the M9** with updated **Huawei Qiankun ADS 3.3 version**. Both versions now have **four lidars** instead of one.
- Roll-out of **ADS 4.0 for Aito M9** vehicles was conducted in **July 2025 with extensive ADAS features** (e.g., SAE L3 driving on highways, navigation from parking space to parking space (P2P 2.0)). **ADS 4.0** is based on the **new "WEWA" architecture** (World Engine in the Cloud, World Action Model) to **enable enhanced human-machine co-driving experience**. For the other **flagship cars** ADS 4.0 is announced for **Q3 2025.**

Sensor Setup***

- 11x cameras
- 3x radars
- 4x lidar
- 0x mic.

Market Availability

L2+

Soon SAE L3 capabilities on highways

Supplier Overview**

- Camera
- Radar
- LiDAR
- ADAS SW
- SoC/ECU
- HD Map

- Upon request -

[1] Chinese players usually rely on Parking Space to Parking Space functionality with automated parking

* Function description on Slide 22-25

** Based on Desk Research. Not considering specific markets Non exhaustive

*** Several USS, not considered in Sensor Setup due to SotA

ADAS Asia | BYD

UPDATE

Consideration of most advanced ADAS vehicle

Urban | SAE-Level 2+ | Rural | SAE-Level 2+ | Highway | SAE-Level 2+

ADAS Function Overview*

	L2/L2+ Functions						L3 Functions			Parking Functions				
Function	ACC	LKA	LCA	TSR	TLR	NoP	Highway Pilot	Urban Pilot	Traffic Jam Pilot	Automated Parking[1]	Remote Parking	Trained Parking[1]	Reverse Assist	Maneuver Assist
Urban			-					-	-					
Rural			-						-			-	-	-
Highway							-		-					

Available | - Not available | N/A

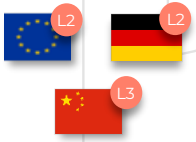
ADAS Snapshot

- BYD with strong ADAS performance and extensive feature portfolio in China.
  - BYD released the **DiPilot Advanced Intelligent Driving Assistance System** with **different versions (DiPilot 100, 300, 600)** and **different sensor modalities**, e.g. for LiDAR and camera.
  - **Navigation on Autopilot (NOA)** in addition to NoP included covering automatic overtaking and automated lane changes.
- The **ADAS stack** is included in the vehicle price and comes as standard.
- In June 2025, deliveries of the new **electric luxury sedan Yangwang U7** began, equipped with the **DiPilot 600** and dual **NVIDIA Orin-X chips**, providing a total of **508 TOPS**.
- BYD plans to introduce a **Level 4 parking feature** via **OTA update for DiPilot 100 and 300** and has pledged to take liability for any damages caused by the system.
- **Advanced Automated Parking (L2+, P2P)** offered in China based on God's Eye B/DiPilot 300 as well as **Automated Valet Parking (L3)**.

Sensor Setup***

- 13x cameras
- 5x radars
- 3x lidar
- 0x mic.

Market Availability



Supplier Overview**

- Camera
- Radar
- LiDAR
- ADAS SW
- SoC/ECU
- HD Map

- Upon request -

[1] Chinese players usually rely on Parking Space to Parking Space functionality with automated parking

* Function description on Slide 22-25

** Based on Desk Research. Not considering specific markets Non exhaustive

*** Several USS, not considered in Sensor Setup due to SotA

ADAS Asia | Honda

UPDATE

Consideration of most advanced ADAS vehicle

Urban	SAE-Level 2	Rural	SAE-Level 2	Highway	SAE-Level 2

ADAS Function Overview*

	L2/L2+ Functions						L3 Functions			Parking Functions				
Function	ACC	LKA	LCA	TSR	TLR	NoP	Highway Pilot	Urban Pilot	Traffic Jam Pilot	Automated Parking	Remote Parking	Trained Parking[1]	Reverse Assist	Maneuver Assist
Urban			-			-		-	-					
Rural			-			-			-		-	-	-	-
Highway						-	-		-					

Available | – Not available | N/A

ADAS Snapshot

- Honda divides its ADAS system according to performance into **Honda Sensing 360, 360+ and Elite**.
- Compared to the Sensing 360 package with basic ADAS functions, the **Honda Sensing 360+** package includes additional features such as **Active Lane Change Assist** or **driver monitoring system**.
- Honda Sensing 360+ was **launched in 2023** and is currently **only available in China**.
- Honda is **partnering with the startup Helm.ai** to bring **L2+/L3 features** to its new **0 Series**, which is set to **launch in 2026** with the Honda 0 Saloon and 0 SUV. It starts with enabling **"Eyes-off" traffic jam pilot**. Further functionalities will expand to all driving scenarios through continuous **OTA updates**.
- Honda and Renesas are jointly developing a **high-performance SoC** for the Honda 0 Series that delivers **2,000 TOPS** at an efficiency of 20 TOPS/W.

Sensor Setup***

- 5x cameras
- 5x radars
- 0x lidar
- 0x mic.

Market Availability

Supplier Overview**

- Camera
- Radar
- LiDAR
- ADAS SW
- SoC/ECU
- HD Map

- Upon request -

* Function description on Slide 22-25

** Based on Desk Research. Not considering specific markets Non exhaustive

*** Several USS, not considered in Sensor Setup due to SotA

ADAS Asia | Hyundai

UPDATE

Consideration of most advanced ADAS vehicle

Urban | SAE-Level 2 | Rural | SAE-Level 2 | Highway | SAE-Level 2+

ADAS Function Overview*

Function	L2/L2+ Functions						L3 Functions			Parking Functions				
	ACC	LKA	LCA	TSR	TLR	NoP	Highway Pilot	Urban Pilot	Traffic Jam Pilot	Automated Parking	Remote Parking	Trained Parking[1]	Reverse Assist	Maneuver Assist
Urban			-			-		-	-			-	-	-
Rural			-			-			-					
Highway						-	-		-					

Available | – Not available | N/A

ADAS Snapshot

- Hyundai's ADAS system is called **Hyundai Smart Sense**.
- The **Highway Driving Assist** feature from Hyundai Smart Sense with **ACC, LCA** and **Speed Limit Adaption** is included in the Elantra, Sonata, Kona, Santa Cruz, Tucson, Santa Fe and Palisade models and is active at vehicle speeds of **up to 150 km/h**.
- The more advanced ADAS system, known as **Highway Driving Assist II**, adds a **lane change feature** that is available at highway speeds **from 60 km/h**. It is included in the Palisade, IONIQ 5 and IONIQ 6 vehicles.
- The **Hyundai Remote Smart Parking Assist 2** enables **Smart Parking**, **Remote Parking** and Remote Moving **Forward** and **Backward**.
- The **ADAS feature package** for the **L2 system** is priced around **€4,500 on top** for end-customers.
- Hyundai announced plans to implement **L2+ features by the end of 2027**.

Sensor Setup***

- 5x cameras
- 3x radars
- 0x lidar
- 0x mic.

Market Availability

Supplier Overview**

- Camera
- Radar
- LiDAR
- ADAS SW
- SoC/ECU
- HD Map

- Upon request -

* Function description on Slide 22-25

** Based on Desk Research. Not considering specific markets Non exhaustive

*** Several USS, not considered in Sensor Setup due to SotA

ADAS Asia | Toyota

UPDATE

Consideration of most advanced ADAS vehicle

Urban	SAE-Level 2+	Rural	SAE-Level 2	Highway	SAE-Level 2+

ADAS Function Overview*

	L2/L2+ Functions						L3 Functions			Parking Functions				
Function	ACC	LKA	LCA	TSR	TLR	NoP	Highway Pilot	Urban Pilot	Traffic Jam Pilot	Automated Parking	Remote Parking	Trained Parking[1]	Reverse Assist	Maneuver Assist
Urban			-			CN		-	-				-	-
Rural			-			CN			-					
Highway							-		-					

Available | – Not available | N/A

ADAS Snapshot

- Toyota's ADAS system is called **T-Mate** and includes **Toyota Safety Sense (TSS)** and **Toyota Parking Assistance**.
- TSS compromises the systems **ACC, LKA, and TSR** whereby Toyota Parking Assistance offers **Automated and Trained Parking**.
- T-Mate also has a **Driver Monitoring System** to monitor **driver alertness** and **condition**.
- The Toyota Group's **most advanced ADAS system** is called **Lexus Safety System+** and is used in its **Lexus** car brand.
- The supplementary **Lexus CoDrive** includes **dynamic ACC** and **Lane Change Assist** at speeds **above 90 km/h**.
- Lexus CoDrive is included in the **Lexus LS models**.
- The **ADAS feature package** for the **L2+ system Lexus Safety System+** priced around **€4200 on top** in dedicated markets for end-customers.
- In March, Toyota launched its **bZ3X SUV**, equipped with **Momenta 5.0 ADAS** and an **NVIDIA Orin-X** delivering **254 TOPS**, enabling **NoP Highway functionality** without reliance on HD maps.

Sensor Setup***

- 11x cameras
- 3x radars
- 1x lidar
- 0x mic.

Market Availability

Supplier Overview**

- Camera
- Radar
- LiDAR
- ADAS SW
- SoC/ECU
- HD Map

- Upon request -

* Function description on Slide 22-25

** Based on Desk Research. Not considering specific markets Non exhaustive

*** Several USS, not considered in Sensor Setup due to SotA

ADAS Asia | Nissan

UPDATE

Consideration of most advanced ADAS vehicle

Urban	SAE-Level 2	Rural	SAE-Level 2	Highway	SAE-Level 2+

ADAS Function Overview*

	L2/L2+ Functions						L3 Functions			Parking Functions				
Function	ACC	LKA	LCA	TSR	TLR	NoP	Highway Pilot	Urban Pilot	Traffic Jam Pilot	Automated Parking	Remote Parking	Trained Parking[1]	Reverse Assist	Maneuver Assist
Urban			-		-	-		-	-		CN		-	-
Rural			-		-	-			-					
Highway					-		-		-					

Available – Not available N/A

ADAS Snapshot

- Nissan's most advanced ADAS system is called **ProPILOT 2.0** which is available without additional cost.
- The newest version **ProPILOT 2.1** enables **hands-off driving** in a **single lane on designated highways** with one-way traffic. The system assists the driver, including **overtaking, lane changes** and **exiting** (L2+ system).
  - ProPILOT 2.1 is only available in the **Japanese** and **North American markets**.
- The **ProPILOT Park** enables **Automated and Trained parking**.
- Nissan showcased the **system's driving capabilities (next gen ProPILOT) with integrated ADAS technology from partnership with Wayve AI** in central Tokyo with Ariya prototype vehicles

Sensor Setup***

- 7x cameras
- 5x radars
- 0x lidar
- 0x mic.

Market Availability

Supplier Overview**

- Camera
- Radar
- LiDAR
- ADAS SW
- SoC/ECU
- HD Map

- Upon request -

* Function description on Slide 22-25

** Based on Desk Research. Not considering specific markets Non exhaustive

*** Several USS, not considered in Sensor Setup due to SotA

ADAS Asia | Polestar

Consideration of most advanced ADAS vehicle

Urban	SAE-Level 2	Rural	SAE-Level 2	Highway	SAE-Level 2

ADAS Function Overview*

	L2/L2+ Functions						L3 Functions			Parking Functions				
Function	ACC	LKA	LCA	TSR	TLR	NoP	Highway Pilot	Urban Pilot	Traffic Jam Pilot	Automated Parking	Remote Parking	Trained Parking[1]	Reverse Assist	Maneuver Assist
Urban			-		-	-		-	-	-	-	-	-	-
Rural			-		-	-			-					
Highway					-	-	-		-					

Available | Not available | N/A

ADAS Snapshot

- Polestar's most advanced ADAS system is called **Pilot Assist.**
- Pilot Assist has **basic ADAS functions** such as ACC, LKA and TSR and can provide **Lane Change Assistance** on highways by activating the turn signal.
- Polestar wants to integrate **Luminar's lidar technology** and **Mobileye's chauffeur platform** in future models of its **Polestar 4**.
- The newly launched **Polestar 5** relies in addition to SotA sensors on **LiDAR** technology.
- The **ADAS stack** is included in the vehicle price and comes as standard.

Sensor Setup***

- 11x cameras
- 1x radars
- 1x lidar
- 0x mic.

Market Availability

Supplier Overview**

- Camera
- Radar
- LiDAR
- ADAS SW
- SoC/ECU
- HD Map

- Upon request -

* Function description on Slide 22-25

** Based on Desk Research. Not considering specific markets Non exhaustive

*** Several USS, not considered in Sensor Setup due to SotA

ADAS Asia

P3 Evaluation

The unveiled **Xiaomi SU7 offers great user experience at lower cost** than Western OEMs – the ADAS has still some weaknesses but is about to catch up with competition. During ADAS Benchmark Event in China 2025, SU7 showed **average ADAS performance**.
After **fatal crash**, Xiaomi has to prove again system reliability towards general public and authorities.
The **success of the YU7** electric SUV has encouraged Xiaomi to **launch its models in Europe from 2027** onwards.

XNGP excels with a **robust ADAS and user-friendly HMI**, with drawbacks like harsh acceleration and low refresh rate for the digital rearview mirror.
In 2024, new P7+ was announced equipped with **cameras and radar sensors presumably comparable to LiDAR performance costly LiDAR** technology was removed from ADAS sensor set.

Strong performance of ADAS NOP with **high availability** (but city cases limited). The AD Max and Pro systems were tested during ADAS Benchmark Event in China 2025 where the L9 above-average ADAS performance. Li Auto offers a **smooth driving experience** and **utilizes ADAS hardware components from well known suppliers**.

Latest news

Rumors were in the press that there will be a joint venture between Ford and Xiaomi. Both companies denied the speculations about this partnership quickly.

(02.02.2026)

Xiaomi plans to lower minimum ADAS mileage required by users of their ADAS systems to unlock the City Navigation Pilot (CNOA) in China.

(16.01.2026)

Update

XPENG merges autonomous driving and smart cockpit departments to establish General Intelligence Center.

(04.02.2026)

Update

Qcraft announced that the Qpilot 2.0 are installed in more than 1 million vehicles, among others in Li Auto L Series.

(26.01.2026)

Update

ADAS Asia

P3 Evaluation

Aito M9 is the **highest-rated vehicle in its peer group**. It excels in setting the **correct speed 90% of the time and parking quickly in tight spaces**. Explainable AI through announcement of every automatically performed maneuver e.g. lane changes. Announced **ADS 4.0 system** from Huawei (Aito is backed by Huawei) is **available in the vehicle models since 2nd half of 2025**.

BYD offers **Level 2 in Europe** and **Level 2+ in China** with larger feature portfolio.
In our **P3 ADAS Benchmark Europe 2025** event, BYD Seal showed **low to medium system performance** with solid availability of Intelligent Cruise Control on highways at speeds higher than 80 km/h. Lane keeping system showed problems while staying in lane.

Honda offers SotA **SAE L2 ADAS features in main global markets**. Through the **partnership with helm.ai** and **Momenta** for next gen ADAS system for SAE L3, **significant ADAS performance advancements** are expected. Honda expects its partnership with Helm.ai to **accelerate the development** of the **Navigate on Pilot** function.

Hyundai mainly **“outsourced”** ADAS development, besides major partnerships for SAE L4, to its **subsidiary Hyundai Mobis** where the partnership with Qualcomm can lead to ADAS performance advancements. Hyundai offers in the ADAS segment **L2+ features** in main global markets.

Latest news

Huawei announced deployment of ADS 4.0 with SAE L3 capabilities from July 2025 onwards at Shanghai Autoshow 2025.

(22.04.2025)

BYD announced to have now assembled a team of over 5,000 people for ADAS development and plans to invest another 14.3 billion USD in ADAS technology.

(04.01.2026)

Update

Honda announced to make additional investment in helm.ai for further enhancing ADAS/AD development.

(15.10.2025)

Hyundai Mobis and Qualcomm announced that they signed a comprehensive collaboration agreement on SDV architectures including ADAS.

(07.01.2026)

Hyundai’s subsidiary 42dot released videos of ots Atria AI test vehicle driving hands-free in urban areas.

(08.12.2025)

Update

ADAS Asia

P3 Evaluation

Toyota offers SotA Level 2 features in main global markets where **partnership between Woven and Waymo** has the potential **to leverage significant knowledge and expertise** for ADAS development. However, Toyota is relying on **Momenta's ADAS system** in its next-generation vehicles, such as the **bZ3X launched in March**.

Nissan offers **NoP (L2+) on US and Japanese highways** with **automated ramp-offs** where they offer SAE L2 features in the EU and China on par with competitors.
Partnership with Wayve AI and signed definitive agreements contributes to **enhance next generation ADAS features significantly**.

Polestar offers a **state-of-the-art L2+ system** in Europe. In our P3 ADAS Benchmark Europe 2025, Polestar 4 showed **average ADAS performance** where settings for **ADAS features can be found easily** via center display. Perception of **new speed limits** and **automated speed adjustment unreliable**.

Latest news

Toyota announced that Bosch will be supplier for ADAS system based on Qualcomm platform.

(18.12.2025)

Update

Nissan and Wayve AI sign definitive agreements to deliver next gen ADAS technology.

(10.12.2025)

Nissan showcased the system's driving capabilities (next gen ProPILOT) with Wayve AI ADAS technology in central Tokyo with Ariya prototype vehicles.

(22.09.2025)

Polestar announced to integrate Google Gemini in all vehicle models from 2026 onwards.

(19.11.2025)

Polestar launched the new Polestar 5 at IAA Mobility 2025 using LiDAR technology for ADAS.

(09.09.2025)

ADAS.NAR Players

ADAS Status, Evaluation & Latest News

Source: Tesla

ADAS NAR | Tesla

UPDATE

Consideration of most advanced ADAS vehicle

Urban	SAE-Level 2+	Rural	SAE-Level 2+	Highway	SAE-Level 2+

ADAS Function Overview*

	L2/L2+ Functions					
Function	ACC	LKA	LCA	TSR	TLR	NoP
Urban			-			CN
Rural			-			CN
Highway						

L3 Functions		
Highway Pilot	Urban Pilot	Traffic Jam Pilot
	-	-
		-
-		-

Parking Functions				
Automated Parking	Remote Parking	Trained Parking	Reverse Assist	Maneuver Assist
		-	-	Only speed control

Available – Not available N/A

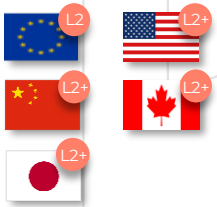
ADAS Snapshot

- Tesla's driver assistance functions are **easily activated via the lever to the right of the steering wheel** where the system available in Europe showed **deviating distances to followed vehicles while using e.g. ACC** during ADAS Benchmark Event 2025.
- The **new FSD V13** is provided via OTA software update for Tesla models equipped with **Hardware 4 (HW4/AI4)** in the U.S. FSD 13.2 significantly improves the **resolution of cameras** and **exterior audio signals** are considered, so that emergency vehicles can be detected. Further, park-to-park and reversing significantly expand functionality.
- The **one-time purchase price for FSD** has been **cut to $7,500** from a high of $15,000 in 2022 for end-customers. Tesla also offers a monthly subscription for FSD, which was reduced to $99 per month in the U.S.
- In Europe, Tesla offers, as of now, L2+ system with only reduced features available from FSD offered in the U.S. **Tesla starts to expand outside USA by receiving a 2-year FSD testing permission in Norway**.
- In the Netherlands, the RDW (organization for vehicle type-approval and vehicle registrations) is **currently testing FSD together with Tesla engineers for a potential exemption approval in the EU.**

Sensor Setup***

- 9x cameras
- 0x radars
- 0x lidar
- 1x mic.

Market Availability



Supplier Overview**

- Camera
- Radar
- LiDAR
- ADAS SW
- SoC/ECU
- HD Map

- Upon request -

* Function description on Slide 22-25

** Based on Desk Research. Not considering specific markets Non exhaustive

*** Several USS, not considered in Sensor Setup due to SotA

ADAS NAR | General Motors

UPDATE

Consideration of most advanced ADAS vehicle

Urban	SAE-Level 2	Rural	SAE-Level 2	Highway	SAE-Level 2+

ADAS Function Overview*

	L2/L2+ Functions						L3 Functions			Parking Functions				
Function	ACC	LKA	LCA	TSR	TLR	NoP	Highway Pilot	Urban Pilot	Traffic Jam Pilot	Automated Parking	Remote Parking	Trained Parking	Reverse Assist	Maneuver Assist
Urban			-		CN	-		-	-		-	-	-	-
Rural			-		CN	-			-					
Highway					CN		-		-					

Available | – Not available | N/A

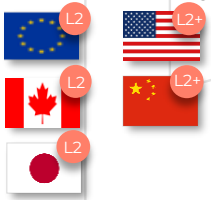
ADAS Snapshot

- **GM's "Super Cruise" L2+ system is available on selected U.S. highways** and can be activated by pressing a button on the steering wheel (when light bar turns green, it is available).
- When it is engaged, **Super Cruise uses a Driver Attention System** that monitors the system status and works to detect your head and eye positioning, reminding you to pay attention to the road.
- In newer versions of Super Cruise which is available in **Cadillac, Chevrolet an GMC models**, the **system can automatically change lanes** proactively in certain situations, like when approaching slower traffic.
- In various Cadillacs, Super Cruise is a $2,855 option or a $25 monthly subscription for end-customers.

Sensor Setup***

- 5x cameras
- 3x radars
- 0x lidar
- 0x mic.

Market Availability



Supplier Overview**

- Camera
- Radar
- LiDAR
- ADAS SW
- SoC/ECU
- HD Map

- Upon request -

* Function description on Slide 22-25

** Based on Desk Research. Not considering specific markets Non exhaustive

*** Several USS, not considered in Sensor Setup due to SotA

ADAS NAR | Ford

UPDATE

Consideration of most advanced ADAS vehicle

Urban | SAE-Level 2 | Rural | SAE-Level 2 | Highway | SAE-Level 2+

ADAS Function Overview*

Function	L2/L2+ Functions						L3 Functions			Parking Functions				
	ACC	LKA	LCA	TSR	TLR	NoP	Highway Pilot	Urban Pilot	Traffic Jam Pilot	Automated Parking	Remote Parking	Trained Parking	Reverse Assist	Maneuver Assist
Urban			-	-	CN	-		-	-		-	-	-	-
Rural				-	CN	-			-					
Highway					CN		-		-					

Available | – Not available | N/A

ADAS Snapshot

- **Ford's "BlueCruise"** is available to customers of **Mustang Mach-E, F-150, F-150 Lightning and Expedition** vehicles purchased in countries with designed Highways (Blue Zones).
- It can be used in a **total of 15 European countries**, following approval by the European Commission.
- Drivers using BlueCruise in Blue Zones can drive with **hands off the steering wheel** so long as they continue to pay attention to the road ahead.
- A **driver-facing camera** located below the instrument cluster checks the driver's eye gaze and head position.
- Ford's BlueCruise priced at $1,450 for 3 years upfront, or $800/year or $75/month after a trial for end-customers.

Sensor Setup***

- ~5x cameras
- ~2x radars
- 0x lidar
- 0x mic.

Market Availability

L2 | L2+ | L2 | L2+ | L2

Supplier Overview**

- Camera
- Radar
- LiDAR
- ADAS SW
- SoC/ECU
- HD Map

- Upon request -

* Function description on Slide 22-25

** Based on Desk Research. Not considering specific markets Non exhaustive

*** Several USS, not considered in Sensor Setup due to SotA

ADAS NAR | Rivian

RIVIAN

Consideration of most advanced ADAS vehicle

Urban	SAE-Level 2	Rural	SAE-Level 2	Highway	SAE-Level 2+

ADAS Function Overview*

	L2/L2+ Functions						L3 Functions			Parking Functions				
Function	ACC	LKA	LCA	TSR	TLR	NoP	Highway Pilot	Urban Pilot	Traffic Jam Pilot	Automated Parking	Remote Parking	Trained Parking	Reverse Assist	Maneuver Assist
Urban			-		-	-		-	-	-	-	-	-	-
Rural			-		-	-			-					
Highway					-	-	-		-					

Available | – Not available | N/A

ADAS Snapshot

- Rivian's **Driver+** ADAS system encompasses **L2 and L2+ features** which are available in the Gen 1 vehicle models (R1T and R1S).
- The most advanced ADAS system **Autonomy Platform+** is available on Gen2 vehicles (model year 2025 and onward) and contains the additional functions **"Lane Change on Command"** and **"Enhanced Highway Assist".**
- **L2+ hands-off feature "Enhanced Highway Assist"** is available only on dedicated highways in USA and Canada. The feature uses **DMS for driver monitoring** and is made available to the R1 via **OTA SW updates.**
- **Driver+ as well as the "Enhanced Highway Assist"** are already **included in the vehicle price** with no additional cost where future pricing seems to include one-time purchase or a subscription model.

Sensor Setup***

- 11x cameras
- 5x radars
- 0x lidar
- 0x mic.

Market Availability

Supplier Overview**

- Camera
- Radar
- LiDAR
- ADAS SW
- SoC/ECU
- HD Map

- Upon request -

* Function description on Slide 22-25

** Based on Desk Research. Not considering specific markets Non exhaustive

*** Several USS, not considered in Sensor Setup due to SotA

ADAS NAR | Lucid

Consideration of most advanced ADAS vehicle

Urban | SAE-Level 2 | Rural | SAE-Level 2 | Highway | SAE-Level 2+

ADAS Function Overview*

	L2/L2+ Functions						L3 Functions			Parking Functions				
Function	ACC	LKA	LCA	TSR	TLR	NoP	Highway Pilot	Urban Pilot	Traffic Jam Pilot	Automated Parking	Remote Parking	Trained Parking	Reverse Assist	Maneuver Assist
Urban			-		-	-		-	-					
Rural			-		-	-			-		-	-	-	-
Highway					-		-		-					

Available | – Not available | N/A

ADAS Snapshot

- Lucid's ADAS packages are splitted in **DreamDrive** and **DreamDrive Pro** which cover **L2** and **L2+ features.**
- **DreamDrive Pro** has the capability of **hands-off driving in curves on highways**, advanced visualizations in instrument panel, **triggered automated lane changes on highways**, Driver Monitoring System (DMS) and usage of LiDAR technology.
- From model year 2025, DreamDrive will be included as standard in all Lucid Air models.
- DreamDrive Pro is integrated as standard in higher-end models such as the **Lucid Air Grand Touring** and the **Dream Edition** as well as in the **Lucid Gravity** later in 2025.
- The **DreamDrive Pro** is priced around **€4,200 on top** for end-customers.

Sensor Setup***

- 11x cameras
- 5x radars
- 1x lidar
- 0x mic.

Market Availability

Supplier Overview**

- Camera
- Radar
- LiDAR
- ADAS SW
- SoC/ECU
- HD Map

- Upon request -

* Function description on Slide 22-25

** Based on Desk Research. Not considering specific markets Non exhaustive

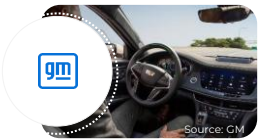
*** Several USS, not considered in Sensor Setup due to SotA

ADAS NAR

P3 Evaluation

With the announcement of required **update of Hardware 3 vehicles sold between 2019 and 2023 with Full-Self-Driving (FSD)** represents a **cost-intensive measure** which confirms that **Elon Musk overpromised** regarding its driver assistance system.
In our **P3 ADAS Benchmark Europe 2025 event**, the Tesla Model Y **showed average ADAS performance** with good centering in the lane on all types of roads where new speed limits are often not recognized (correctly).
Disbanding working on Dojo AI training supercomputer with impacts on ADAS development which have to evaluated.
With national approval of FSD in the Netherlands and potential extension to other European countries, Tesla is able to catch up with other OEMs regarding ADAS in the EU. In this context, Musk announced at Davos summit that FSD will be launched allegedly in Europe and China in February/March 2026.

Update



GM is continuously developing its ADAS functionalities under the name "**Super Cruise"**. With rolling out its L2+ "Super Cruise" system on further models in 2025, competitive advantage to be proven.
GM's announcement for eyes-off driving from 2028 onwards which is specified by SAE L3 aims for strengthening its market position especially in the U.S.

Update

Latest news

Tesla dropped its use of the term "Autopilot" to avoid a 30-day suspension of its sales and manufacturing licenses in California.

(18.02.2026)

Tesla is now offering Full Self-Driving (FSD) (Supervised) only via paid subscription (monthly rate). In addition, Basic Autopilot as standard feature for new Model 3 and Model Y orders in North America are removed. This means that Autosteer is not available anymore, only Traffic-Aware Cruise Control (TACC).

(23.01.2026/14.01.2026)

Tesla received FSD testing permission with safety driver for public roads in Luxembourg.

(11.01.2026)

Update

GM announced eyes-off driving from 2028 onwards for the Cadillac ESCALADE IQ.

(22.10.2025)

GM announced development of further ADAS features by recruiting former Cruise employees.

(12.08.2025)

Update

ADAS NAR

P3 Evaluation

Ford said **to focus on developing different L2+ and L3 applications** for privately used cars. With increase of BlueCruise availability in several vehicle models in Europe, Ford aims for **strengthening its market position** regarding ADAS.
The announced **availability of L3 from 2028 onwards** strengthens Ford's intention to leverage competitive advantage.

Update

Rivian offers **L2+ system with automated lane change feature** under suitable conditions in the U.S. which has to be triggered manually. Main target market represents the U.S. where footprint in the EU is rather small. This is subject to change due to **partnership with Volkswagen**.

Lucid as premium luxury automaker focuses on **SotA L2/L2+ ADAS features** where with new Gravity model, it aims to introduce more advanced features.
For Lucid Air, **hands-free lane changes as L2+ feature** is available via OTA update which enhances competitiveness.

Latest news

Ford announced at CES 2026 to develop the next generation of its BlueCruise ADAS system which will support hands-free driving from 2028 onwards. In addition, BlueCruise usage increased by 88% in the U.S. in 2025 which underlines increasing acceptance of SAE L2 systems.

(28./07.01.2026)

Update

Rivian announced that with "Universal Hands-Free" ADAS features in R1 are available on more than 3.5 million miles of roads in the U.S.

(18.12.2025)

Rivian announced that vehicle owners can subscribe ADAS features for $50 a month or pay $2,500 for full access.

(11.12.2025)

Update

Here announced that Here ADAS solution is integrated into Lucid's DreamDrive systems. Lucid's Intelligent Speed Assistance (ISA) uses up-to-date speed limit information for regulatory compliance.

(05.01.2026)

Lucid announced a major update via OTA update of its DreamDrive Pro with hands-free driving and hands-free lane changes for the Lucid Air from 30th July 2025 onwards and for Gravity owners later this year.

(15.07.2025)

Update

Further ADAS-related News.

UPDATE

Further ADAS-related news

Latest news

Teradar unveiled Summit, its terahertz vision sensor at CES 2026, offering 300-meter range and all-weather performance for L2-L5 autonomous vehicles with production targeted for 2028.

#Technology

(06.01.2026)

Helm.ai expands its vision-only autonomous driving stack, scaling from Level 2+ to Level 4 without HD maps or lidar using its Factored Embodied AI architecture.

#Technology

(26.02.2026)

At CES 2026, Aumovio launched an in-vehicle projection solution for automotive interiors across the entire width of the cockpit. High resolution projectors are integrated into the headliner or directly into the overhead control panel.

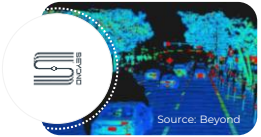
#Technology

(06.01.2026)

Texas Instruments introduced automotive semiconductors at CES 2026 including the TDA5 SoC family with up to 1200 TOPS AI performance and an eight-by-eight 4D imaging radar transceiver.

#Technology

(25.02.2026)



Seyond debuts its Hummingbird solid-state LiDAR series at CES 2026, offering a mass-production-ready solution with a confirmed OEM design win and compliant U.S. manufacturing options.

#Technology

(02.01.2026)

UPDATE

Further ADAS-related news

Latest news

Wayve AI announced to acquire German startup Quality Match. The aim of this acquisition is to enhance the data quality of Wayve's ADAS system.

(11.12.2025)

Wayve raised $1.5 billion in Series D funding to deploy its end-to-end AI autonomy platform globally, with robotaxi trials planned for 2026 and consumer vehicle integration starting in 2027.

#Acquistion

(26.02.2026)

Harman announced to acquire ADAS division from ZF to enter strategically markets for ADAS technologies and computing platforms.

#Acquisition

(23.12.2025)

Harbinger acquired Phantom AI and secured a ZF licensing deal, bringing computer vision ADAS technology to medium-duty electric trucks and ZF's passenger car portfolio.

#Acquistion

(25.02.2026)

A major U.S. automaker will deploy Mobileye's EyeQ6H-powered Surround ADAS as standard equipment, pushing the company's projected system deliveries beyond 19 million units.

(05.01.2026)

Mobileye's SuperVision and Surround ADAS have been selected by Mahindra for at least six models launching from 2027.

#Contract

(10.02.2026)

UPDATE

Further ADAS-related news

Latest news

Aptiv secured its first Indian commercial vehicle ADAS contract, deploying Gen 6 ADAS technology across 14 truck and bus models ahead of 2027 safety regulations requiring emergency braking and collision detection.

#Contract (07.01.2026)

VinFast and Autobrains partner to develop L2++ autonomous technology and a camera-based Robo-Car system targeting Level 4 autonomy without LiDAR or HD maps.

#Partnership (27.02.2026)

Hesai Technology partners with Grab to expand LiDAR deployment in Southeast Asia by leveraging Grab's extensive local resources and established commercial network.

#Partnership (05.02.2026)

MediaTek and DENSO combine semiconductor expertise with automotive integration to create a custom ADAS SoC featuring AI acceleration, multi-sensor fusion, and ISO 26262 safety compliance for global markets.

#Partnership (30.12.2025)

Luminar Technologies initiates Chapter 11 bankruptcy to facilitate asset sales, including a $110 million agreement for its LSI subsidiary. The LiDAR production and service delivery is expected to continue throughout the court-supervised process.

#Bankruptcy (25.02.2026)

Key Takeaways.

Summary and assessment

UPDATE

Performance and functionality of Chinese systems is beyond other regions especially for L2 systems which have highest market shares in the next years.

		USA	Europe	China
Level 2	Lane keeping & Active Cruise Control	Industry standard	Industry standard	Industry standard
Level 2+	Navigation on Pilot **on Highway**	Available by Tesla FSD Beta and GM, Ford	Available by BMW on highways until 130 km/h (approval based on UNECE R171 (DCAS))	Available for most CN highways
	Navigation on Pilot **in City Routes**	Available by Tesla FSD Beta 12.5.	N/A	Available even in most dense traffic situation in major cities
Level 3	**Traffic Jam Pilot** (max 60 km/h) (no driver supervision)	Until beginning of 2026 limited availability by BMW / MB	Until beginning of 2026 limited availability by BMW / MB BMW & MB removed L3 from ADAS portfolio	Legislation pending– planned for 2025
	Highway Pilot (max 130 km/h) (no driver supervision)	Not available yet	Until beginning of 2026 MB Drive Pilot BMW & MB removed L3 from ADAS portfolio	Legislation pending – planned for 2025

As major tipping points have been reached and **wide-spread adoption** is expected, the fierce competition in the ADAS market is intensified by **fast-learning Chinese players which shifted fast to L2++ functions, leveraging local suppliers** and **strong AI capabilities**. OEMs and suppliers need to set a **clear strategic path** to prevail in the market.

Low Maturity ◔ ◀▶ ● High Maturity

BUSINESS AS UNUSUAL

WE EMPOWER
FUTURE IMPACT

TECHNOLOGY
SOFTWARE
CONSULTING

www-p3-group.com