

CIC 灼识



Global Commercial Vehicle Intelligent Driving Industry Report

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Executive Summary

The global commercial vehicle intelligent driving industry is entering a phase of explosive growth driven by technological maturity, policy support, and strong demand for safety and efficiency. Closed environments (mines, ports, industrial parks) serve as the earliest and most mature commercial scenarios, while intercity and urban road applications are rapidly expanding.

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1. Market Overview

1.1 Market Definition

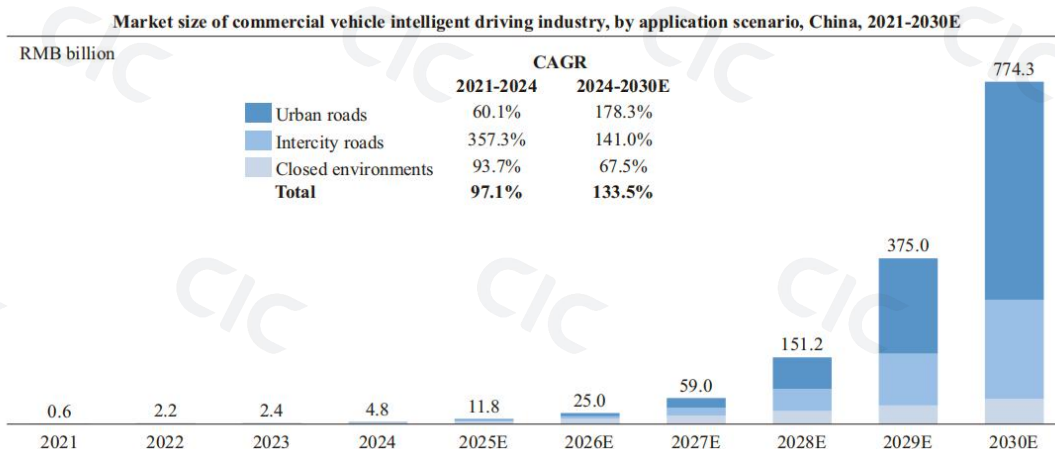
The global commercial vehicle intelligent driving industry provides Level 2+ and higher automation solutions for commercial vehicles, as an advanced branch distinct from Level 1–2 ADAS, and is developing toward fully unmanned operation in complex scenarios. Supported by strong demand driven by core industry demands for safety, efficiency and reliability, and with favorable early deployment conditions in closed environments such as mines, ports and industrial parks, intelligent driving solutions for commercial vehicles have been widely applied across urban roads, intercity roads and closed scenarios.

The industry is still in the early commercialization stage, with closed environments realizing mature deployment while urban and intercity road applications remain in pilot phase. Passenger vehicle-focused players face high technical barriers in sensor configuration, vehicle motion control and adaptation to harsh working conditions when entering this market. The industry features two core business models, product sales and fleet operation, and two installation modes, factory-installed and aftermarket, among which the factory-installed

model is expected to become the mainstream as the ecosystem matures.

1.2 Market Size and Growth

The global commercial vehicle intelligent driving market reached RMB10.0 billion in 2024 and is projected to surge to RMB1,614.4 billion by 2030 at a CAGR of 133.3%, while China's market is expected to expand from RMB4.8 billion in 2024 to RMB774.3 billion by 2030 driven by supportive policies and technological progress.

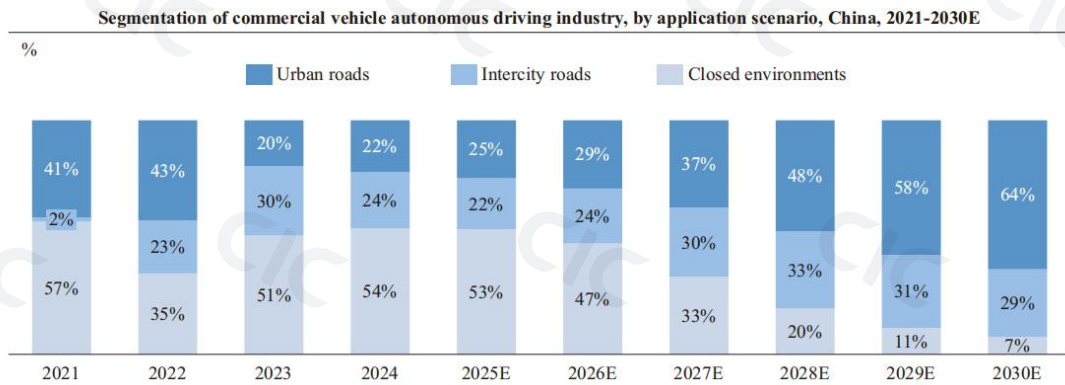


Note: The market size includes revenues from both product sales and fleet operations.

Source: CIC Reports

Closed environments dominated the global and Chinese markets in 2024, accounting for 50.8% and 53.8% of the respective total market

sizes. Urban and intercity road segments will register faster growth in the future, with the closed-environment segment expected to reach RMB107.5 billion globally and RMB56.8 billion in China by 2030.



Source: CIC Reports

2. Key Growth Drivers

2.1 Key Drivers

Safety

Safety is the most critical concern in commercial vehicle operations, since accidents can lead to severe injuries, significant economic losses and disruptions to operations. The introduction of intelligent driving technology enables driverless commercial vehicle operations, reducing accidents caused by human error and minimizing potential casualties and financial losses. Additionally, drivers face health risks associated with commercial vehicle operations, such as chronic lung and hearing problems caused by dust and noises in mining areas. Vehicle automation can protect drivers from prolonged exposure to hazardous environments, thereby lowering such health risks.

Efficiency and Reliability

Operations with manned commercial vehicles are often suspended due to humans' limited attention span and inability to work long, consecutive hours. In contrast, intelligent driving commercial vehicles can operate 24/7, thereby improving operational efficiency and reliability.

2.2 Application Scenarios

Urban roads

Featuring high traffic density and complex unstructured conditions, urban roads demand advanced perception and algorithm capabilities, while fragmented regulations and restrictions on fully driverless operations lead to prolonged commercialization and exploratory business models.

Intercity roads

With standardized traffic conditions and fewer complex road interactions, intercity roads have higher deployment feasibility, supported by consistent policies and steady progress in large-scale pilots and commercialization for logistics despite remaining automation-level regulations.

Closed environments

Benefiting from clear boundaries, controllable conditions and supportive national policies, closed environments (especially high-demand open-pit mines) are the most promising scenarios, enabling highly feasible, reliable and efficient commercial deployment of intelligent driving solutions.

2.3 Future Outlook

Going forward, commercial vehicle intelligent driving will extensively enhance operational safety and efficiency, driving the global commercial transportation sector toward a highly intelligent and autonomous future.



About CIC

CIC is a professional consulting firm offering tailored end-to-end support across the full investment and financing lifecycle. The firm boasts a world-leading track record in guiding landmark first-in-sector IPOs across global markets, alongside unrivaled reach and in-depth coverage capabilities across specialized niche market segments.

CIC helps enterprises refine scalable business models and craft compelling capital narratives to enable seamless access to global capital markets, while serving as a trusted due diligence partner to investment institutions. It delivers granular industry insights and direct access to subject matter experts, empowering clients to identify high-value opportunities and mitigate critical risks effectively.

CIC team maintains deep, real-time market intelligence across a diverse set of sectors—including financial services, artificial intelligence, big data, internet, high technology, healthcare, education, entertainment, consumer goods, transportation and logistics, energy and power, environmental and building technology,



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chemicals, industrial manufacturing, and agriculture—delivering unparalleled access to sector-specific, actionable insights.

CIC Reports & Industry Overview

At CIC, we employ a rigorous, multi-method research framework, combining primary and secondary sources to underpin our analysis. Primary research involves in-depth engagements with industry thought leaders and practitioners, particularly in supply chain finance. Secondary research synthesizes publicly available datasets from authoritative bodies, including the National Bureau of Statistics of the People's Republic of China, the State Administration of Financial Regulation (SAFR, formerly the China Banking and Insurance Regulatory Commission), the China Securities Regulatory Commission (CSRC), and public company filings. We apply proprietary data analytics frameworks to process collected information, validating findings through cross-referencing data from multiple research streams to ensure analytical rigor and reliability.

All statistical data presented is verifiable and grounded in information available as of the date of this report.



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Extracts are refined summaries of in-depth CIC industry research reports, highlighting supply and demand trends, key growth drivers, R&D trends and future outlook, etc. of various segmented fields, integrating multi-dimensional insights such as expert interviews, market surveys and industry data analysis.

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