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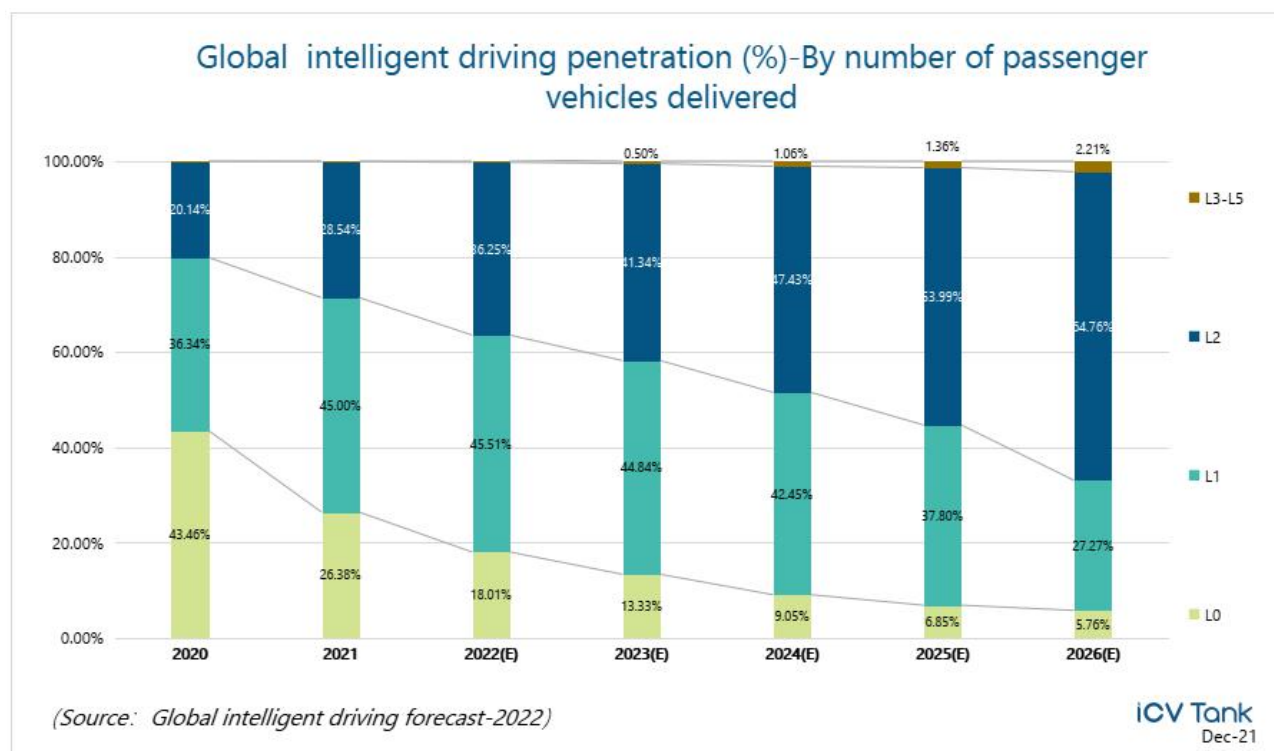
*Technology Advisory  
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# Global Intelligent Driving Forecast-2022

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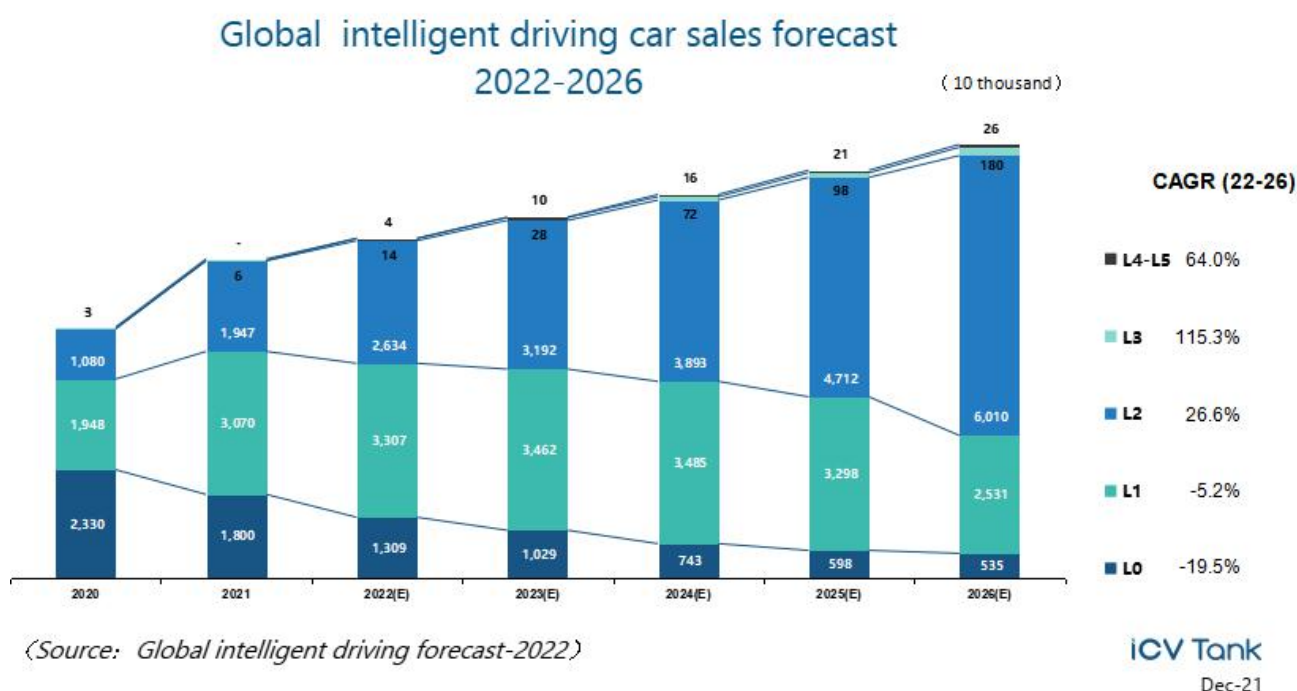
In 2020, 43.46% of automated vehicles globally do not have any driving assistance function, while the penetration rate of Level 1 (L1) and above automated vehicles has reaching 73.62% in 2021, which has a significant increase compared with 2020.



The global market penetration rate of L1 and above automated vehicles is expected to reach 94.24% by 2026, reaching 87.468 million. Due to different policies and regulations on Level 3 (L3) automated vehicles in different countries, the development of L3 and above automated vehicles is not optimistic. In the next five years, Level 2 (L2) automated vehicles will become the main market, and the five-year compound growth rate will reach 22.9%.

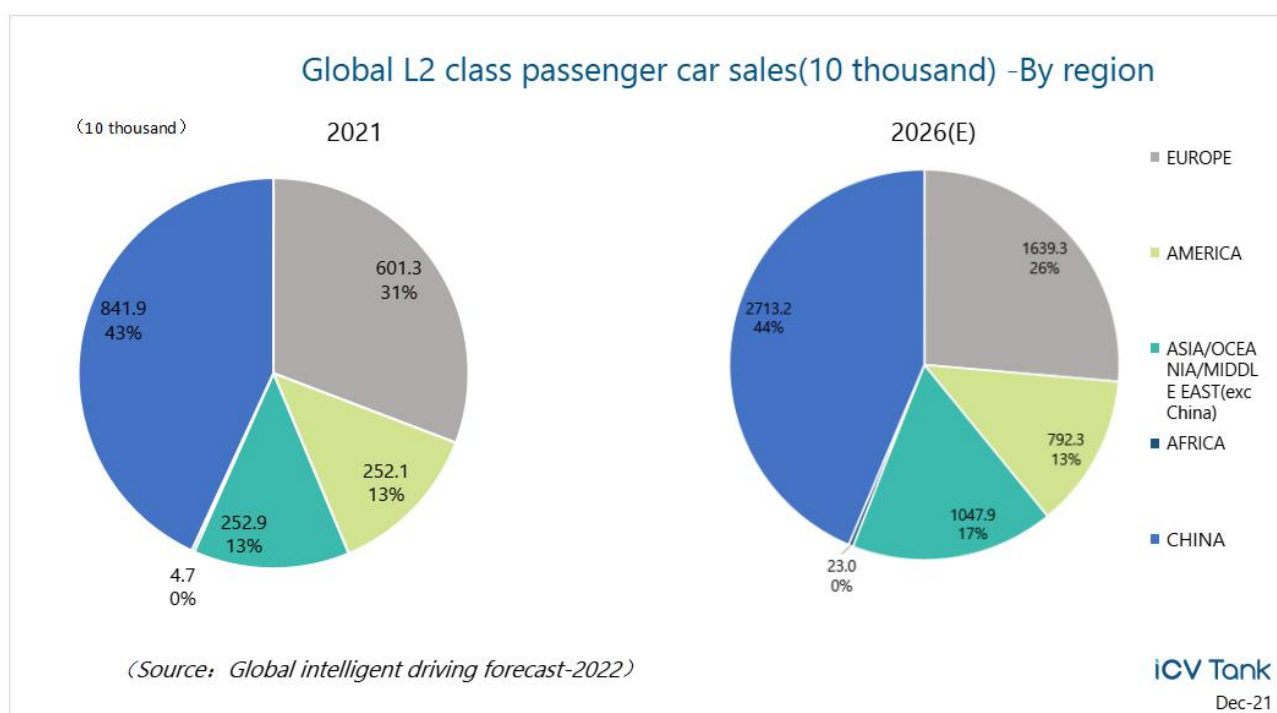
2024 will be an important year for the global passenger driving market, and L2 automated vehicles sales will great than L1 for the first time. The penetration rate of L2 and above

automated vehicles will be more than half by the end of 2024, which means that since 2024, global selling cars will be provide high level automated driving suite or function. The market inflection point for L1 vehicles will appear in 2022, the proportion of L1 in the global market will be 45.51%, reach the highest in history. From the sales forecast, L1 automated vehicles will reach a peak of 34.845 million units in 2024.



In the regional distribution market, China will still be the main market of the global car industry. We predict that China will account for about 40.12% of the world by 2026. L1 class passenger cars in the Chinese market accounted for 43% of the global sales in 2021, but the China L1 passenger cars market is expected to fall to 33% by 2026 with the rapid popularity of L2 class passenger cars in this market.

China L2 passenger car market will account for 43% of the global sales in 2021. By 2026, China market is expected to account for 44% of the global sales, and the sales volume will increase from 8.419 million in 2021 to 27.132 million in 2026. Both the growth in global share and absolute numbers indicate that China market will be a major participator in the development of global automated driving technology in the next five years.



The market size of China automated driving will keep growing. On the one hand, China has vast car market and increasing spending power; on the other hand, Chinese enterprises, especially innovative companies actively lays out the automated driving chain, which shaped the global competitiveness of Chinese technology enterprises. In addition, relying on the cost advantage of the manufacturing industry, the whole vehicle price has achieved the ultimate advantage.

At ICV we are passionately curious about New Technology and we strive to deliver the most robust market data and insights, to help our customers make the right strategic decisions.

We are currently focusing on cutting-edge technologies such as intelligent driving, quantum and AI, and new energy.

We bring together the deepest intelligence across the widest set of capital-intensive industries and markets. By connecting data across variables, our analysts and industry specialists present our customers with a richer, highly integrated view of their world.

That is the benefit of The New Intelligence. We're able to isolate cause and effect, risk and opportunity in new ways that empower our customers to make well-informed decisions with greater confidence.



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