TTD September 23, 2026 - Wayve Gets Mercedes-Benz As Customer

This is the Telemetry Transportation Daily for September 23, 2026, and I'm Sam Abuelsamid, Vice President of Market Research for Telemetry.

UK-based Wayve has been on a roll for the past year. The developer of assisted- and automated-driving software has won a third production deal with an automaker, with today's announcement that it will be supplying Mercedes-Benz. Previously, Wayve got production design wins from Nissan and Stellantis to provide software for hands-off and eyes-off driving assist, with the Nissan program expected to launch during its 2027 fiscal year. The Stellantis programs will probably begin launching in 2028.

The program announcement with Mercedes-Benz is sparse on details apart from saying it will launch within two years. It comes as something of a surprise since Mercedes-Benz has been working with Nvidia for several years, and this year became the first automaker to launch a production program based on Nvidia's full Hyperion drive stack, including the new Alpamayo world-driving model. In addition to running on Nvidia Orin chips, Mercedes-Benz is using an Nvidia operating system, a classical driving model, Alpamayo, and a safety and policy evaluator.

The Wayve Driver system already runs on Nvidia compute hardware, so it's possible that the change may not require any hardware updates for Mercedes-Benz. While Mercedes-Benz has demonstrated point-to-point hands-free driving, which is often referred to as Level 2++ with the CLA, the Nvidia system hasn't been released to customers yet. Even with Wayve coming in, Nvidia will likely still get the revenue from silicon sales.

We're seeing an ongoing shift in the global marketplace for advanced driver-assist systems and automated driving. China, which is the largest market by far, is adopting locally produced solutions from companies like Horizon and Huawei. Western companies seem to be shifting strategy regularly between in-house solutions and new and established vendors, including Nvidia, Qualcomm, and Mobileye. It will be very interesting to watch if Ford and GM can successfully develop their own in-house solutions over the next couple of years or if they pivot back to suppliers.

Thanks for listening.