

Global Intelligent Driving Industry Report, 2014

Sep. 2014

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications.

Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

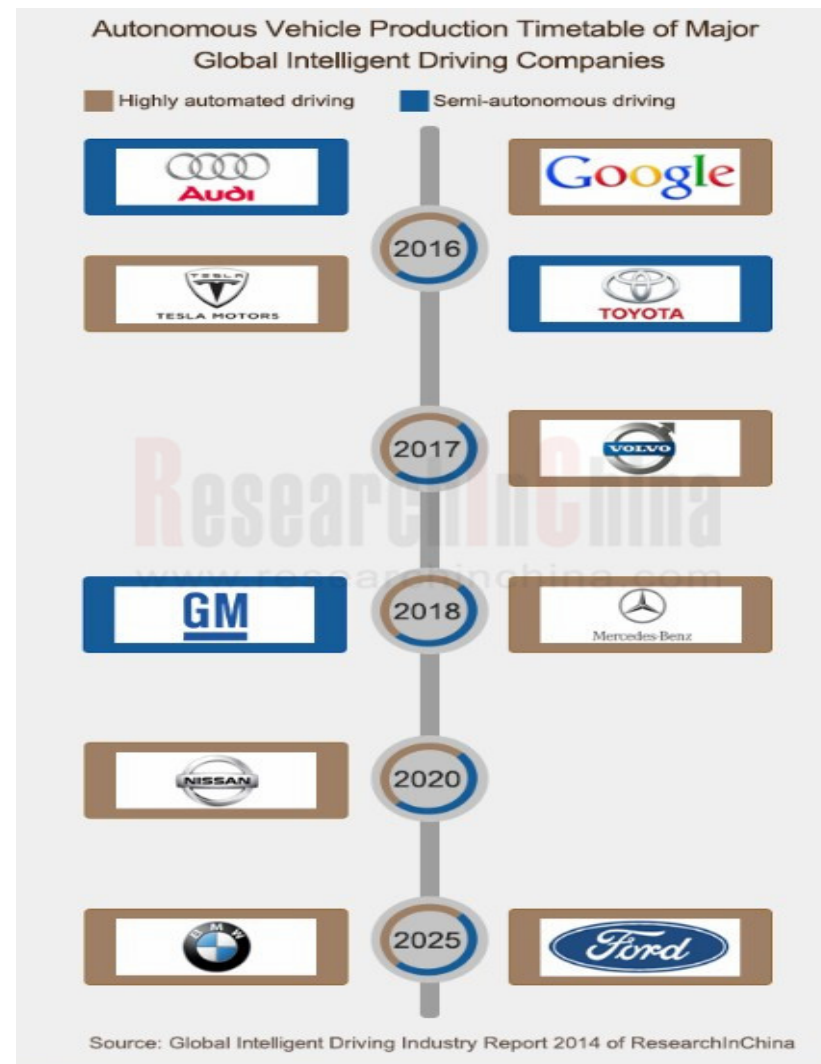
The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

Abstract

Intelligent car is now developing towards in-vehicle infotainment and intelligent driving, which have become increasingly practical since 2013. Intelligent driving is based on various driver assistance technologies, chiefly aimed at automated or unmanned driving.

Already-launched automated driving technologies by international advanced vehicle makers are still in the stage of driver assistance or semi-automated driving. In addition to a great many high- and medium-class cars, some economical passenger cars have also begun to adopt driver assistance technologies, and automated driving systems in a particular case like traffic jam assistant have been installed in some streamlined advanced models. Automated driving technologies in the research and development test have entered the highly-automated driving stage. In 2013-2014, several vehicle makers or technology companies e.g. Google launched their highly-automated driving concept models.

Driver assistance technologies all over the world have ushered in massive configuration of advanced driver assistance system (ADAS), which is also one of the most-demanding automotive sectors in recent years, expected to see a CAGR of 20% over 2013-2017.



The combined utilization of multiple ADASs can achieve a higher automation and make driving smarter. As a general rule, the more ADAS systems a car carries, the more intelligent it is. On the whole, Volvo, Mercedes-Benz, BMW, Audi and Nissan lead the way in ADAS configuration, with more functions, higher automation and supporting ratio. Vehicle makers prefer to apply ADAS systems to new, top-selling and new energy models.

Volvo will sell the first with highly-automated driver assistance system - XC90 at the end of 2014, followed by other leading vehicle makers from 2015. It is expected that mass-produced highly-automated cars will appear around the year 2020, and large-scale commercially-applied fully-automated ones around 2030.

Global Intelligent Driving Industry Report, 2014 focuses on the following:

- Overview of intelligent car and intelligent driving, including intelligent car industry chain scale, development stages of intelligent driving, overview of main driver assistance systems and automated driving technologies;
- Application of ADAS around the world, covering market size of global ADAS industry chain, growth trends of ADAS, and configuration of main ADASs;
- Application of intelligent driving systems by major vehicle makers, including technologies used in ADASs, already-used advanced driver assistance technologies, and ADAS Configurations in various models;
- R&D and application of latest technologies, road test items and automated driving roadmaps of automated driving technology-leading vehicle makers and technology companies.

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- 1.1 Intelligent Car
- 1.2 Overview of Intelligent Driving
- 1.3 Driver Assistance Technology
 - 1.3.1 Lane Keeping Assist (LKA)
 - 1.3.2 Parking Assist System (PAS)/ Reverse Assist System (RAS)
 - 1.3.3 Collision Avoidance System (CAS)/Brake Assist System (BAS)
 - 1.3.4 Adaptive Cruise Control (ACC)
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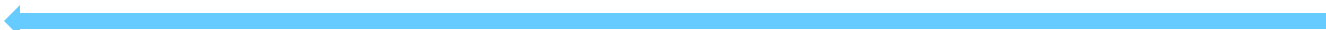
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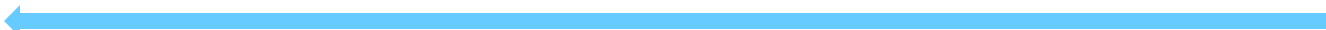
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 - Nissan's Public Road Test of Autonomous Drive in Nov. 2013
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 - 3D Image (Analogical) Produced by Google Laser Range Finder
 - Car Makers Using Mobileye's Image Processing Chips
 - Functions Provided by Mobileye's Camera-based Products

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