ADAS and Autonomous Driving Industry Chain Report 2018 (IV)-OEMs and Integrators

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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.

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Abstract

Globally, all major OEMs now develop ADAS and autonomous driving systems. Regionally, European and American OEMs take a lead in the development of autonomous driving, having achieved L2/L3 advanced driver assistance on large scale and expected to seal the accomplishment of L3/L4 autonomous driving around 2021; Japanese and South Korean OEMs hold a relatively conservative attitude to autonomous driving. Take Toyota for example, it designs two development paths for autonomous driving: Guardian (advanced safe driving assistance) and Chauffeur (autonomous driving), but without specific timetable for L4/L5; China's home-grown OEMs are catching up, as an array of models with L2 ADAS functions will be mass-produced in 2018 according to plans of OEMs including Changan Automobile, FAW Hongqi, Geely, BAIC and Chery. Local carmakers plan to achieve L4/L5 during 2025-2030.

The world-renowned ADAS and autonomous driving system integrators consist of Continental, Aptiv, Valeo, ZF, Bosch, etc., and they are featured in 2018 as follows:

1) The system integrators are gearing towards the suppliers of fusion solutions along with technological advances. Bosch, for instance, set up in 2017 a team engrossed in the development of domain controller whilst developing new-generation sensors (next-generation MMW radar, next-generation front camera, next-generation around view system, and the LiDAR under way), in a bid to meet the massive computing demand to be brought by fusion of sensors in future and to provide its partners with overall package. Abroad, Bosch together with Daimler is pushing forward the L4 autonomous driving development, and in China it has provided ADAS solutions to the carmakers like Geely. Besides, Bosch is to provide L2 high-speed cruise solutions to a Chinese OEM, and mass-production is to be realized in 2020.

2) It grows evident that system integrators seek for collaboration. For example, Continental develops controllers based on NVIDIA DRIVE platform and carries cooperation with many companies like HERE, easyMILE, BMW-Intel-Mobileye Alliance, Huawei, Baidu and China Unicom, leading to a Continental-led autonomous driving ecosystem. Via investments and collaboration, ZF boasts a great many partners such as TRW, IBEO, ASTYX, e.Go, HELLA, NVIDIA and Baidu and has business covering system development, sensors, software decision, HD map, vehicle development and smart cockpit.

In China, the system integrators spring up, represented by Baidu, Neusoft and HiRain Technologies among which Baidu's development is most impressive. As of July 2018, Baidu's Apollo autonomous driving platform has attracted 116 partners and 26 carmakers (most of local Chinese carmakers and four foreign peers, i.e., Daimler, Ford, Hyundai and Honda). Apollo 3.0 ushers in mass-production of autonomous driving vehicle in parks and Baidu focuses more on the implementation of L2-L3 autonomous driving solutions. Baidu's autonomous driving projects in tandem with the automakers starts practical application from 2018 on.

ADAS and Autonomous Driving Industry Chain Report 2018 (IV) 4-1 OEMs by ResearchInChina highlights the following:

◆European and American OEMs' ADAS and autonomous driving (status quo, functions achieved, development planning, development strategy, system solutions, major partners, etc.);

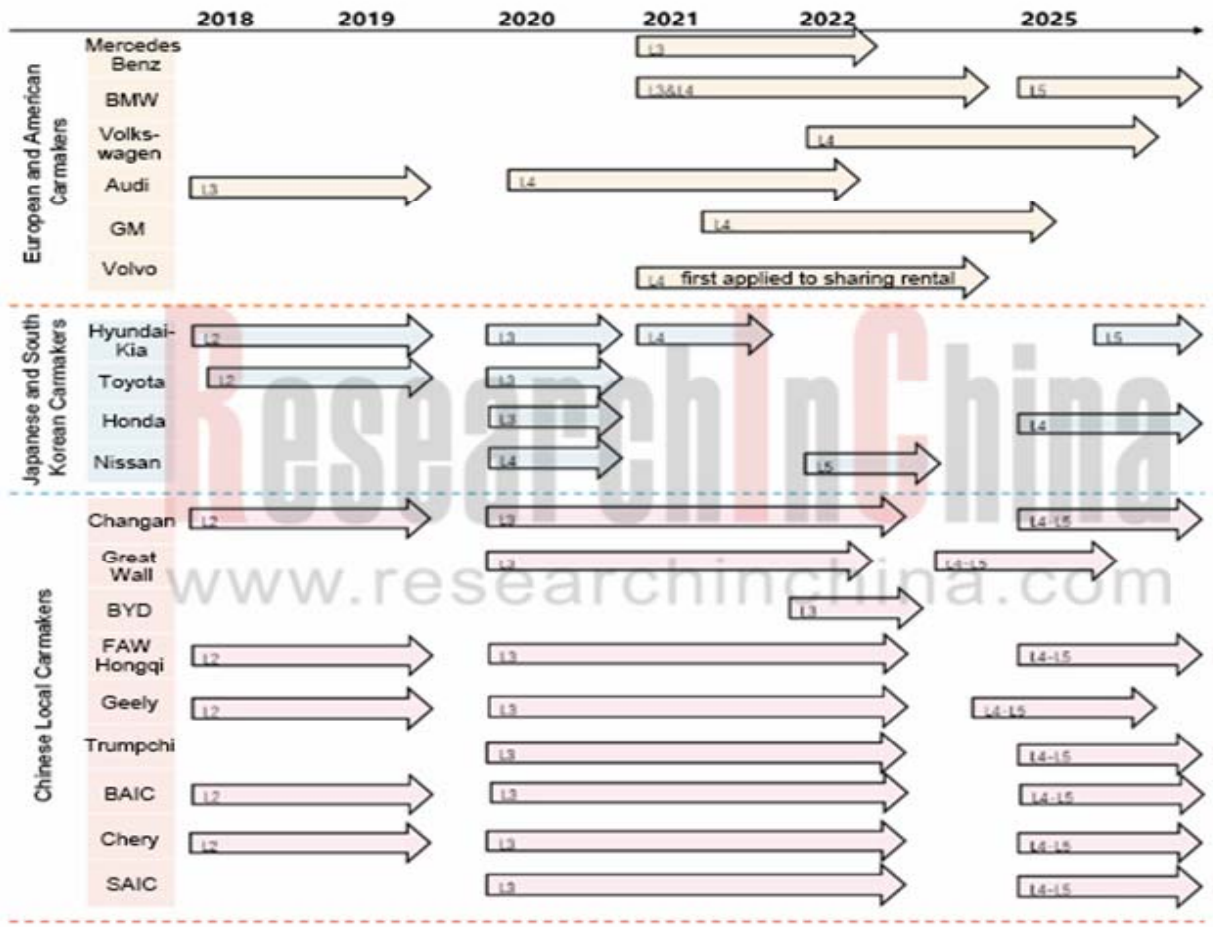
◆Japanese and South Korean OEMs' ADAS and autonomous driving (status quo, functions achieved, development planning, development strategy, system solutions, major partners, etc.);

◆Chinese OEMs' ADAS and autonomous driving (status quo, functions achieved, development planning, development strategy, system solutions, major partners, etc.)

◆Global integrators of ADAS and autonomous driving solutions (status quo, product portfolios, development strategies and plans, major customers, partners, etc.);

◆Chinese integrators of ADAS and autonomous driving solutions (status quo, product portfolios, development strategies and plans, major customers, partners, etc.).

Autonomous Driving Development Plans of Major Global OEMs (Timeline), 2018-2025



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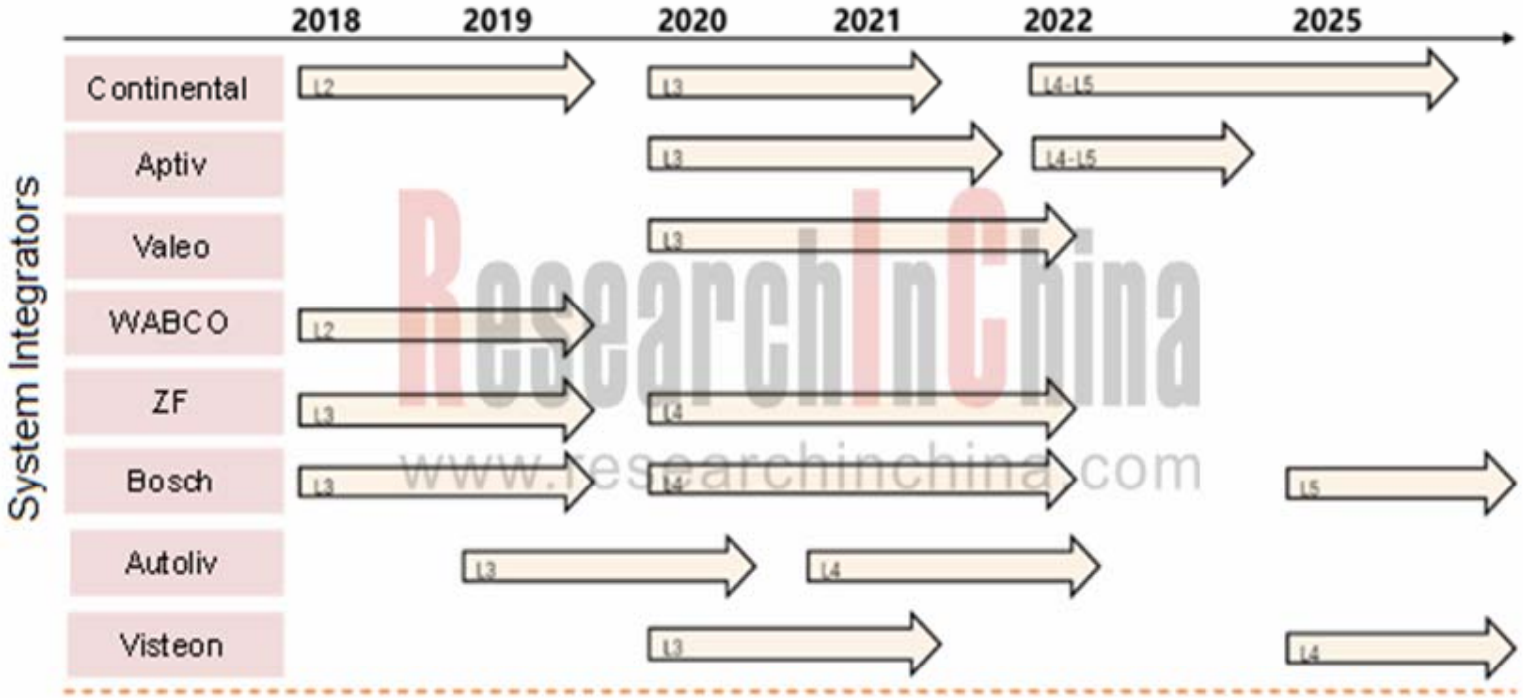
Autonomous Driving Development Plans of Major System Integrators (Timeline), 2018-2025



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