



# China Passenger Car Camera Market Report, 2019Q1

May 2019

## **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

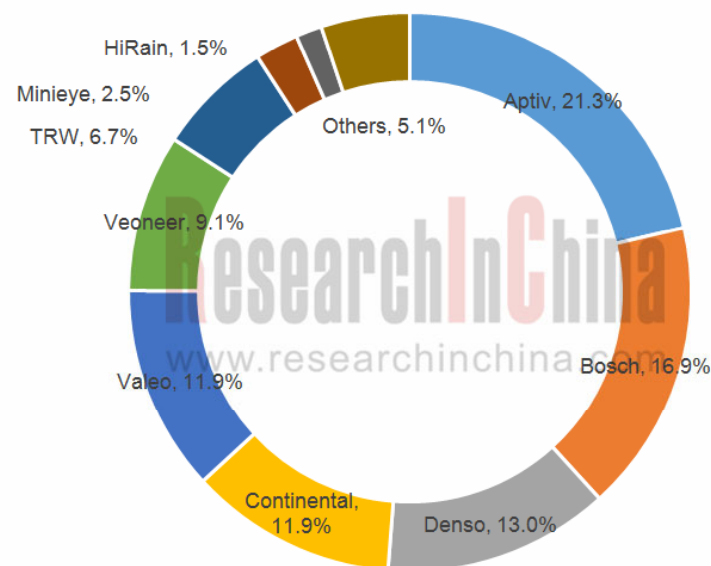
### Passenger Car Camera Market: Front-view Monocular Camera Installation Soared by 71.7% in 2019Q1 from the Same Period Last Year.

In China, front view monocular camera is the one largely demanded in passenger car market, with its installations in 2019Q1 surging by 71.7% from the same period of 2018, according to our recent report -- China Passenger Car Camera Market Report, 2019Q1.

The top three players Aptiv, Bosch and Denso commanded 21.3%, 16.9% and 13.0% of the market, respectively.

Chinese vendors have made headway in ADAS camera field, among which Minieye and HiRain Technologies have entered the top ten monocular camera vendor list where the four radar monopolists, Aptiv, Bosch, Continental and Denso are also ranked, with respective market share of 2.5% and 1.5%.

Market Shares of Passenger Car Front View Monocular Camera Vendors, 2019Q1



Source: ResearchInChina

**This is quarterly report, are totally 4 issues a year, with annual subscription fee of USD6,000. Reseller distribution is not allowed.**

Bosch vision-based ADAS products grow fast in the Chinese market. In 2019Q1, the market share of its forward looking monocular cameras jumped to 16.9% compared with less than 10% in 2018. The mass-produced Chinese vehicle models packing Bosch L2 autonomy technology include: Geely Borui GE, Changan CS55, Great Wall VV6, Geely Binrui, SAIC Marvel X and SGMW New Baojun RS-5. Bosch expects more than 40 models with its L2 capability will be available on market in 2019.

### Features of Perception, Decision Making and Execution for Bosch L2.5 to L3+ Autonomy

Item	Braking & Steering	Domain Controller	HD Map & High Precision Positioning	Camera	Other Sensors
<b>L2.5: Highway Assist (HWA)</b>	Electronic stability program (ESP) and electric power steering system (EPS) are used for vertical and horizontal control, with no need for redundant actuator	DASy basic version	Optional HD map	1 third-generation forward looking monocular camera  Optional driver monitoring camera	Bosch fifth-generation radars installed at the front and four corners of vehicle
<b>L3: Traffic Jam Pilot (TJP)</b>	Braking system features a mutually redundant design of ESP and iBooster; steering system has a redundant design, too.	DASy enhanced version		Forward looking monocular camera  Driver monitoring camera  <b>Stereo camera</b>	Radar; ultrasonic sensor
<b>L3+: Highway Pilot (HWP)</b>	Redundant design for braking system and steering system	Two domain controllers are mutually redundant	HD map; high precision positioning	Forward looking monocular camera  Stereo camera  Driver monitoring camera	Radar; ultrasonic sensor; <b>LiDAR</b>

Of the 572 new car models launched in China in 2019Q1 (note: the number of models is counted based on configuration), SAIC rolled out the most, 66 models; BYD followed with 41 models having the most complete camera configurations.

In 2019Q1, BYD released 7 new cars in 41 models, including: 8 with monocular SD camera; 32 with fisheye SD camera; 26 with fisheye HD camera; 8 with around view camera; 24 with side view camera; 28 with reversing camera; 26 with driving recorder. Vision sensor configurations of some models are shown below.

Vehicle Model	Version	Price (RMB)	Time of Launch	Monocular Application Functions	Monocular SD Quantity	Fisheye Application Function	Fisheye SD Quantity	Fisheye HD Quantity	Surround View Camera	Side View Camera	Rear View Camera	Driving Recorder
QIN	2019 Super-power 1.5TI automatic smart connected Fengxiang (National V Emission Standards)	109,900	Mar.2019	ACC, AEB, AHS, FCW, LDW, PD, TSR	1	Reversing camera, driving recorder, right front blind spot camera	2	1		1	1	1
QIN	2019 Super-power 1.5TI automatic smart connected Fengyao (National V Emission Standards)	115,900	Mar.2019	ACC, AEB, AHS, FCW, LDW, PD, TSR	1	AVS, driving recorder, right front blind spot camera	1	5	4	1		1
QIN	2019 Super-power 1.5TI automatic smart connected Fengxiang (National VI Emission Standards)	109,900	Mar.2019	ACC, AEB, AHS, FCW, LDW, PD, TSR	1	Reversing camera, driving recorder, right front blind spot camera	2	1		1	1	1
QIN	2019 Super-power 1.5TI automatic smart connected Fengyao (National VI Emission Standards)	115,900	Mar.2019	ACC, AEB, AHS, FCW, LDW, PD, TSR	1	AVS, driving recorder, right front blind spot camera	1	5	4	1		1
SONG MAX	2019 1.5TI automatic smart connected Ruidong (National V Emission Standards)	116,900	Mar.2019			Reversing camera, driving recorder, right front blind spot camera	2	1		1	1	1
SONG MAX	2019 1.5TI automatic smart connected Ruiyao (National V Emission Standards)	129,900	Mar.2019			AVS, driving recorder	4	1	4			1
SONG MAX NEV	2019 DM 1.5TI smart connected Zhiyao	198,900	Mar.2019			AVS, driving recorder	4	1	4			1
YUAN NEV	2019 EV535 smart connected Lingchuang	129,900	Mar.2019			Reversing camera, driving recorder, right front blind spot camera	2	1		1	1	1

**Preface**

Research Background and Contents

Methodology

Terminology

**1 Chinese Passenger Car Camera Market**

Front-view Monocular and Stereo Camera Installations and Growth Rate in Chinese Passenger Car Market, 2019Q1

Front-view Monocular and Stereo Camera Installations to New Cars in China, Jan 2018 - Mar 2019

Proportion of Front-view Monocular Camera Installations to New Passenger Cars in China by Price, 2019Q1

Top 20 Brands by Front-view Monocular Camera Installations to New Passenger Cars in China, 2019Q1

Top 30 Models by Front-view Monocular Camera Installations to New Passenger Cars in China, 2019Q1

Front-view Monocular Camera Suppliers to New Passenger Cars and Their Share by Installations in China, 2019Q1

Front-view Monocular Camera Suppliers to New Passenger Cars and Their Installations and Share in China, 2018Q1-2019Q1

Camera Installations to New Cars and Installations by Position in China, 2019Q1

Proportion of Camera Installations to New Cars in China by Number & by Position, 2019Q1

Rear-view Camera Installations to New Cars and Growth Rate in China by Reversing Camera and Streaming Rear-view Mirror, Jan-Mar 2019

Rear-view Reversing Camera and Streaming Media Installations to New Cars in China, Jan 2018 - Mar 2019

Proportion of Reversing Camera Installations to New Cars in China by Price, 2019Q1

Top 20 Brands by Reversing Camera Installations to New Cars in China, 2019Q1

Monthly Surround-view Camera Installations to New Cars in China, Jan 2018 - Mar 2019

Proportion of Surround-view System Installations to New Cars in China by Price, 2019Q1

Top 20 Brands by Surround-view System Installations to New Cars in China, 2019Q1

Side-view Camera Installations to New Cars and Growth Rate in China, Jan-Mar 2019

Side-view Camera Installations to New Cars in China, Jan 2018 - Mar 2019

**2 Installations and Dynamics of Automotive Vision Suppliers**

## 2.1 Aptiv

2.1.1 Front-view Monocular Camera Installations and Share in Chinese Passenger Car Market, 2018Q1-2019Q1

2.1.2 Recent Developments

## 2.2 Bosch

2.2.1 Front-view Monocular Camera Installations and Share in Chinese Passenger Car Market, 2018Q1-2019Q1

2.2.2 Models Supported and Recent Developments

2.3 Denso's Front-view Monocular Camera Installations and Share in Chinese Passenger Car Market, 2018Q1-2019Q1

2.4 Continental's Front-view Monocular Camera Installations and Share in Chinese Passenger Car Market, 2018Q1-2019Q1

2.5 Valeo's Front-view Monocular Camera Installations and Share in Chinese Passenger Car Market, 2018Q1-2019Q1

2.6 Veoneer's Front-view Monocular Camera Installations and Share in Chinese Passenger Car Market

2.7 TRW's Front-view Monocular Camera Installations and Share in Chinese Passenger Car Market, 2018Q1-2019Q1

2.8 Gentex's Front-view Monocular Camera Installations and Share in Chinese Passenger Car Market, 2018Q1-2019Q1

2.9 HiRain's Front-view Monocular Camera Installations and Share in Chinese Passenger Car Market, 2018Q1-2019Q1

## 2.10 Minieye

Front-view Monocular Camera Installations and Share in Chinese Passenger Car Market, 2018Q1-2019Q1

Recent Developments

**3 Vision Sensor Configuration and Features of Chinese Automakers**

## 3.1 Great Wall Motor

Vision Sensor Configuration of Newly-launched Models, 2019Q1

Visual ADAS Features of Newly-launched Models, 2019Q1

## 3.2 Geely

Vision Sensor Configuration of Newly-launched Models, 2019Q1

Visual ADAS Features of Newly-launched Models, 2019Q1

## 3.3 BYD

Vision Sensor Configuration of Newly-launched Models, 2019Q1

Visual ADAS Features of Newly-launched Models, 2019Q1

## 3.4 SAIC Passenger Vehicle

Vision Sensor Configuration of Newly-launched Models, 2019Q1

Visual ADAS Features of Newly-launched Models, 2019Q1

## 3.5 Chang'an Automobile

Vision Sensor Configuration of Newly-launched Models, 2019Q1

Visual ADAS Features of Newly-launched Models, 2019Q1

## 3.6 Hanteng Autos

Vision Sensor Configuration of Newly-launched Models, 2019Q1

Visual ADAS Features of Newly-launched Models, 2019Q1

## 3.7 Leapmotor

Vision Sensor Configuration of Newly-launched Models, 2019Q1

Visual ADAS Features of Newly-launched Models, 2019Q1



**4 Vision Sensor Configuration and Features of Joint Venture Brands**

## 4.1 Beijing Benz

Vision Sensor Configuration of Newly-launched Models, 2019Q1

Visual ADAS Features of Newly-launched Models, 2019Q1

## 4.2 GAC Toyota

Vision Sensor Configuration of Newly-launched Models, 2019Q1

Visual ADAS Features of Newly-launched Models, 2019Q1

## 4.3 BMW Brilliance

Vision Sensor Configuration of Newly-launched Models, 2019Q1

Visual ADAS Features of Newly-launched Models, 2019Q1

## 4.4 SAIC Volkswagen

Vision Sensor Configuration of Newly-launched Models, 2019Q1

Visual ADAS Features of Newly-launched Models, 2019Q1

## 4.5 SAIC-GM

Vision Sensor Configuration of Newly-launched Models, 2019Q1

Visual ADAS Features of Newly-launched Models, 2019Q1

## 4.6 FAW-Volkswagen

Vision Sensor Configuration of Newly-launched Models, 2019Q1

Visual ADAS Features of Newly-launched Models, 2019Q1

#### 4.7 FAW Toyota

Vision Sensor Configuration of Newly-launched Models, 2019Q1

Visual ADAS Features of Newly-launched Models, 2019Q1

#### 4.8 Dongfeng Yueda Kia

Vision Sensor Configuration of Newly-launched Models, 2019Q1

Visual ADAS Features of Newly-launched Models, 2019Q1

#### 4.9 Chery Jaguar Land Rover

Vision Sensor Configuration of Newly-launched Models, 2019Q1

Visual ADAS Features of Newly-launched Models, 2019Q1

#### 4.10 Chang'an Mazda

Vision Sensor Configuration of Newly-launched Models, 2019Q1

Visual ADAS Features of Newly-launched Models, 2019Q1

#### 4.11 Dongfeng Peugeot Citroën

Vision Sensor Configuration of Newly-launched Models, 2019Q1

Visual ADAS Features of Newly-launched Models, 2019Q1

#### 4.12 JMC Ford

Vision Sensor Configuration of Newly-launched Models, 2019Q1

Visual ADAS Features of Newly-launched Models, 2019Q1

### **5 Development Trends of Vision Sensor Industry**

5.1 Development Trends of Visual Processing Chips

5.2 Development Trends of Software and Algorithms

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