

**Global and China Leading Tier1 Suppliers'  
Intelligent Cockpit Business Research  
Report, 2020 (I)**

**Jul.2020**

## 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

### **Leading Tier1 Suppliers' Cockpit Business Research Report: Eight Development Trends of Intelligent Cockpit**

Abstract: in the next two or three years, a range of new intelligent cockpit technologies will be in place and mounted on vehicles, according to the Global and China Leading Tier1 Suppliers' Intelligent Cockpit Business Research Report.

High automation faces technical and regulation challenges and it takes a long period of time to build 5G network and roadside infrastructure. In this context, much enthusiasm for intelligent cockpit is being aroused before automated driving technology becomes mature enough. Intelligent cockpits featuring new design concept draw more attention from consumers than automated driving technology does.

Globally, OEMs and Tier1 suppliers are racing to explore how to launch new intelligent cockpit technologies. We expect that numerous intelligent cockpit products will be launched successively in the upcoming two years or three. Based on the picture at CES 2020, development trends for intelligent cockpit can be seen below:

**(1) Cockpit domain control unit (DCU):** next-generation intelligent cockpit systems are DCU-centric and enable features of cockpit electronic systems through a unified software and hardware platform, which incorporate intelligent interaction, intelligent scenarios and personalized services and serve as the foundation for human-vehicle interaction and V2X connectivity.

(2) Multi-display interaction: the cockpit design of dual-display interaction (center console, dashboard), four-display interaction (center console, dashboard, entertainment screen at the copilot's seat, vehicle control display), or even five-display interaction (center console, dashboard, entertainment screen at the copilot's seat, vehicle control display, rear seat entertainment display) is trending. Multi-display interaction needs complete cockpit domain architecture, and fusion of technologies, e.g., cockpit DCU, multi-chip (like TI automotive chips and Qualcomm entertainment chip), multiple operating systems (Linux, Android Automotive), Hypervisor virtualization technology, interaction logic, and HMI design. Tier1 suppliers are required to be more competent in product development and technology integration while seeking business growth amid the rising average selling price (ASP) of intelligent cockpit per vehicle.

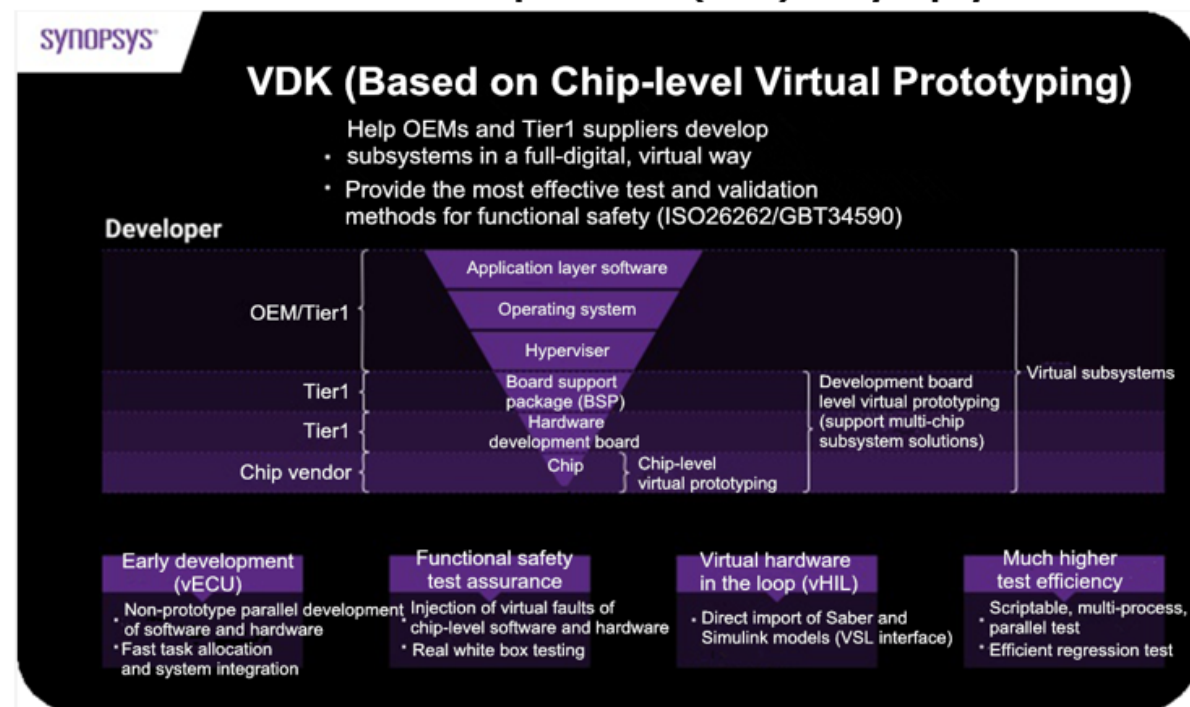
## Rising ASP of Visteon Integrated Cockpit Electronics per Vehicle



Source: Visteon

(3) Cockpit virtualization technology (separate development of software and hardware): virtual prototyping technology makes design, R&D and test of intelligent vehicles more efficient. Virtualizer Development Kit (VDK) based on virtual prototyping technology enables virtual simulation of electronic control units (ECU), e.g., chips, circuits and components. Automakers can commence development and test of software twelve months ahead of time before the availability of hardware, upgrading physical development to intelligent development in simulation environment. Also, ECUs for virtual simulation can accelerate and extend tests, and simulate various tests in extreme conditions, which is hard to achieve in real and physical circumstances and which secures faster roll-out of safer and more reliable products into market. The virtual prototyping technology is applicable to virtual development and test of all complex electronic systems such as intelligent cockpit and ADAS.

## Virtualizer Development Kit (VDK) of Synopsys



Source: Synopsys

- (4)** Higher value of cockpit electronics software: the more complex vehicle system software means it makes up ever more of the total cost of a vehicle. OEMs and Tier1 suppliers are expanding software developers in R&D workforce. Examples include Desay SV, an intelligent cockpit bellwether in China, which boasted about 1,300 software engineers in 2019, a 70% share of its headcount; and Bosch in possession of 30,000 software talents, or 41% of the total staff in 2019 endeavoring to recruit more software developers. Between 2019 and 2020, Bosch set up Bosch China Innovation and Software R&D Center and Bosch Digital Cabin (Shanghai) R&D Center.
- (5)** Cockpit “terminal-cloud” integration, T-BOX and V2X as gateway of data from inside and outside vehicle, and cockpit big data as core competitive edge of products: intelligent cockpit will be a combination of terminals and cloud, in which all kinds of service contents, timely information sharing and complex computation will be offered and done over cloud, more than acts as a stand-alone terminal. In future cockpit big data will be the core competitive edge of products, making center console and dashboard, center information display (CID) navigation, T-BOX and air-conditioner controller, integrated.
- (6)** Evolution of vehicle display from flat rectangular screen to large curved screen: in January 2020, Corning’s high-performance Gorilla cold-rolled glass was first available to GAC Aion LX; in early 2020, Visteon and Corning joined hands to further develop ColdForm technology which will be spawned by Corning for automotive curved display systems; in July 2020, Rightware under Thundersoft, and LG Electronics partnered to develop the industry’s first curved OLED display for 2021 Cadillac Escalade.
- (7)** Glasses-free 3D display: 3D effect makes eyes capture information more quickly. Bosch, Continental and more all focus on mass production and installation of glasses-free 3D displays in the next two year or three. At CES 2020, Continental showcased its 3D Lightfield display technology which was co-developed with Leia Inc. and mass production is arranged in 2022.

**(8)** Driver monitoring system (DMS) or interior monitoring system (IMS): IMS based on camera and AI is the core product of Tier1 suppliers. DMS will play a crucial role in whether a new vehicle model can be rated five stars by Euro NCAP. For example, Continental plans to mass-produce DMS in 2021 and Bosch in 2022.

The Global and China Leading Tier1 Suppliers' Cockpit Business Research Report studies in depth strategies, technologies and products of leading Tier1 suppliers of intelligent cockpit, and highlights the following: (1) strategic plan and business layout of intelligent cockpit; (2) layout of intelligent cockpit technology centers, R&D centers and production bases; (3) intelligent cockpit product line, products and technical solutions, typical customers and vehicle models, mass production schedule, etc.; (4) intelligent cockpit product roadmap and development plan; (5) suppliers of intelligent cockpit products, technology and modules.

**Comparison of Cockpit Solutions between Bosch and Continental**

Research Content	Bosch	Continental
Cockpit DCU (chip)	Vehicle computer	Body electronic platform—IIP (Integrated Interior Platform)
Intelligent Head Unit (IVI/infotainment/Display)	mySPIN IVI system	NAC/RCC (navigation and car entertainment system, intelligent voice assistant solution)
Vehicle displays (center console, dashboard, HUD, etc.)	Full LCD instrument/curved instrument cluster Vehicle glasses-free 3D display Digital rearview mirror Intelligent cockpit multi-display interaction	C/W HUD, AR HUD Vehicle instrument Glasses-free 3D display (light field display) Curved AMOLED display
Integrated control panel (ICP)	Vehicle control display and NeoSense haptic feedback technology	Curved console display system Haptic Interaction Surface
T-BOX/C-V2X/5G	Hybrid connectivity control unit (CCU)	T-Box Intelligent antenna Integrated with 5G- hybrid-V2X solution
DMS&IMS cockpit monitoring system	AI-based DMS	Multi-camera system integrated with front facing and 360-degree visibility DMS, recognition algorithms-driven interior camera
Cockpit thermal management and battery management system (BMS)	Cloud-based BMS	BMS for 48V systems
Other cockpit modules (OTA, gateway, telematics security, telematics big data, etc.)	OTA/FOTA solution	EB tresos vehicle basic software products OTA solution --EB cadian Sync, intelligent network gateway

The Global and China Leading Tier1 Suppliers' Cockpit Business Research Report has two parts, of which:  
Part 1 with 320 pages in total covers 6 Tier1 suppliers, i.e., Bosch, Continental, Denso, Valeo, Faurecia and Panasonic.  
Part 2 with 350 pages in total covers 7 Tier1 suppliers, i.e., Aptiv, Visteon, LG Electronics, Hella, Samsung Harman, Desay SV and Joyson Electronics.



### 1. Bosch Intelligent Cockpit Business (50 Pages)

Bosch's R&D Expenses and Business Structure

Distribution of R&D Centers of Bosch Car Multimedia and Software Business in China

Bosch Digital Cabin (Shanghai) R&D Center's Layout of Intelligent Cockpit

Bosch China Innovation and Software R&D Center

Bosch Cockpit Electronic Product Lines

Bosch Cockpit DCU Products

Bosch Cockpit DCU Architecture

Bosch DCU Planning

Bosch Intelligent Cockpit to Fuse with Ever More ECUs

Bosch Multimedia Fusion Control Product System Architecture (I)

Bosch Multimedia Fusion Control Product System Architecture (II)

Bosch Multimedia Fusion Control Product System Architecture Roadmap

Bosch Cockpit System Security Solution

Bosch Cockpit DCU to Fuse with Automotive Central Computer in Future

Bosch Planning and Technical Routes for Cockpit DCU Products

Bosch Center Information Display (CID) and Infotainment Business (I)

Bosch Center Information Display (CID) and Infotainment Business (II)

Bosch Full LCD Cluster Business (I)

Bosch Full LCD Cluster Business (II)


Bosch Full LCD Cluster Business

Bosch Priority over Glasses-free 3D Display Technology

Bosch Digital Rearview Mirror (Mirror Cam System) Business

Bosch Vehicle Control Screen and NeoSense Haptic Feedback Technologies

Bosch Planning and Technical Routes for Display Products



- Bosch Intelligent Cockpit Multi-display Interaction Business
- Bosch Cockpit HMI Business Model
- Bosch Cockpit HMI Business Planning
- V2X Products of Bosch
- Partners of Bosch V2X Products
- Bosch V2X Product Testing Project of Bosch
- Auto Parking Technology Roadmap of Bosch
- L2 Auto Parking Solution of Bosch
- L3/L4 Auto Parking Solution of Bosch
- L5 Auto Parking Solution of Bosch
- Bosch Current Featured AVP Solution for Parking Field
- Bosch DMS Business (I)
- Bosch DMS Business (II)
- Bosch DMS Software Algorithm Partner
- Bosch Cloud-based Battery Management System
- Bosch OTA/FOTA Technology Solution (I)
- Bosch OTA/FOTA Security Control Strategy (II)
- Bosch Together with FAW Jiefang to Roll out First FOTA Update Solution for Commercial Vehicle in China
- FOTA Technology Strategy of Bosch
- Summary of Bosch Cockpit Products, Suppliers and Customers
- Core Team of Bosch China
- Core Team of Bosch Multimedia
- Distribution of Bosch Multimedia's Production Bases in China

**2. Cockpit Business of Continental (57 Pages)**

Global Operations of Continental

Key R&D Centers of Continental Automotive in Greater China

Organizational Reshuffle of Continental AG

Products and Operations of Business Divisions of Continental AG

Product Line of Continental Automotive

Cockpit Electronics Portfolio of Continental

Cockpit DCU of Continental: Body Electronics Platform IIP

DCU Partners of Continental

Continental ECU Architecture Heading toward High-performance Central Computer

Continental's Planning and Technical Routes for Cockpit DCU Products

Multimedia System of Continental

Strategic Collaboration between Continental and Pioneer on Infotainment System

Continental Multimedia System: Cloud Terminal

Continental Multimedia System: Speaker-free Audio System (Ac2ated Sound)

Continental Multimedia System: Intelligent Voice Assistant

HUD Products of Continental

Continental HUD Product: W-HUD

Continental HUD Product: C-HUD

Continental HUD Product: AR-HUD


Continental HUD Product: DMD HUD

Continental HUD Product: Holographic HUD


Continental Display Solution: Automotive Cluster

Continental Display Solution: Glasses-free 3D Display

Continental Display Solution: Glasses-free 3D "Lightfield Display"




- Continental Display Solution: Curved AMOLED Display
- Continental Display Solution: Curved Display Technology
- Continental Display Solution: Haptic Feedback Technology
- Continental Display Solution: Smart Connected Cloud Cluster
- Continental's Planning and Technical Routes for IVI and Display Products
- Continental Integrated Control Panel (ICP): Curved Console Panel System
- Continental Integrated Control Panel (ICP): Haptic Interactive Display
- Continental Integrated Control Panel (ICP): Morphing Control
- Advanced Intelligent T-Box (I) of Continental
- Advanced Intelligent T-Box (II) of Continental
- Continental Partners with China Unicom to Set up UCIT, Continental Provides T-Box and China Unicom Offers TSP Platform
- Intelligent Antennas of Continental
- DSRC-based One Box of Continental
- Continental T-Box Integrated with 5G-Mixed-V2X Solution
- Continental's Planning and Technical Routes for T-Box and V2X Products
- Continental AVP System: EB joint development with Baidu Apollo for Faster Commercialization of AVP
- Multi-vision Fusion Solution of Continental
- Continental DMS: Interior Camera with Recognition Algorithms
- Continental's Planning and Technical Routes for Multi-vision Fusion and DMS Products
- Continental's Other Cockpit Module: OTA
- Continental's Other Cockpit Module: Automotive Cybersecurity Solution
- Continental's Cockpit Control Unit: Onboard Intelligent Gateway
- Vitesco Technologies (the Powertrain Company of Continental AG) to Development and Produce BMS
- 48V Battery Management System of Continental
- Summary of Continental's Products, Suppliers and Customers



Strategic Investments and Collaborations of Continental  
Connectivity and Mobility Ecosystems of Continental  
Board of Directors of New Organization Structure of Continental AG  
Core Staffers of Continental's Cockpit Electronics (Body Electronics Business Segment)  
Continental's Core Team in Greater China  
Continental's Cockpit Electronics (Body Electronics Business Segment) Manufacturing Bases in China

### **3. Denso Cockpit Business (48 Pages)**

Denso Global R & D System  
Denso Organizational Structure and R&D Expenses  
Denso's R&D Centers in China  
Denso Automotive Electronic Product System  
Denso Cockpit Electronic Product Lines  
Denso CASE Strategic Layout  
Denso CASE Core Technology  
Denso Intelligent Cockpit Technology Roadmap  
Denso ADAS/AD Technology Frame  
Denso Cockpit DCU  
Denso Cockpit System - Harmony Core™  
Denso New Integrated Vehicle Platform  
Denso Service Oriented Architecture (SOA)  
Denso G-BOOK Infotainment System  
Denso Vehicle Navigation Products  
Denso Console Display Business  
Denso OLED Display Technology Layout



- Denso HUD Business
- Denso Instrument Business
- Next-generation Digital Instrument Co-developed by Denso and Wuhan Kotei Informatics
- Denso Driver Monitoring System
- Commercial Vehicle DMS Co-developed by Denso and FotoNation
- Denso Vehicle Air-conditioner Controller
- Coordination between Air-conditioner Controller and Human Machine Interface (HMI)
- Denso DCM (T-BOX) Business
- Denso V2X Business
- Denso Automatic Parking Business
- Denso to Launch AVP in 2020
- Denso Selects eSOL Basic Platform to Develop Surround View Systems
- Denso OTA Solution
- Denso Telematics Security Solution
- Denso's Other Cockpit Modules (I)
- Denso's Other Cockpit Modules (II)
- Denso Battery Management System Business
- Denso NiMH Battery Management System
- Denso Lithium Battery Management System
- Denso PHEV Battery Management System (I)
- Denso PHEV Battery Management System (II)
- Denso PHEV Battery Management System (III)
- Summary (I) of Denso Cockpit Products, Suppliers and Customers
- Summary (II) of Denso Cockpit Products, Suppliers and Customers
- Denso CASE Industry Alliance Layout

Core Team of Denso China  
Denso Production Layout in China

#### **4. Valeo Cockpit Business (53 Pages)**

Valeo's Technical Centers and Organizational Structure  
Valeo Automotive Business Architecture and Product Solutions  
Development of Valeo's Divisions in 2019  
Valeo Future Development Plan  
Future Development Plan of Valeo CDA Division  
R&D Center (China) of Valeo CDA Division  
Valeo Production and R&D Layout (China)  
Valeo Cockpit Electronic Product Lines  
Valeo Integrated Center Console  
Valeo Dashboard and Multi-display Integration  
Valeo HUD Products  
Valeo L1-L4 HMI Systems  
Valeo Integrated Control and Air-conditioner Controller Panels  
Valeo Cockpit Temperature Management and Smart Cocoon Products  
Valeo TCU (TBOX) & C-V2X Business  
Development History of Valeo Automated Parking Business  
Valeo Automated Parking Business in China  
Valeo Park4U? Sensor Upgrade Roadmap  
Valeo Valet Park4U: Entry into AVP System for Parking Field with Cisco  
Valeo Upgrade from Park4U? Automated Parking to Cruise4U/Drive4U  
Valeo Park4U/Cruise4U Requires Strong Capability of Software Algorithm Development

Valeo Cockpit Monitoring System

Valeo DMS

Valeo IMS

Valeo Battery Thermal Management System

Schematic Diagram of Valeo Battery Thermal Management System (Electric Bus)

Valeo Battery Thermal Management System (Electric Bus)

Valeo Cockpit Environmental Management System - Smart Cocoon

Valeo In-Cabin Air Solution

Valeo Cockpit Virtual Perception Technology: VoyageXR & CallXR

Summary of Valeo Cockpit Products, Suppliers and Customers

Summary of Valeo Module Suppliers and Partners

Valeo Global Management Team

Core Team of Valeo in China

Core Team of Valeo in China

Production Bases (China) of Valeo CDA Division

### **5. Faurecia Cockpit Business (63 Pages)**

Faurecia's Profile and R&D Expenses

Faurecia's Technical Centers and Organizational Structure

Distribution of Faurecia R&D Centers in China

Faurecia R&D Innovation Process: from Ideas to Products to Automotive Application

Faurecia Focuses on Two Technology Strategies: "Cockpit of the Future" and "Sustainable Mobility"

Business Development of Faurecia Clarion Electronics

Development Plan 2025 of Faurecia Clarion Electronics

Development Plan 2025 of Faurecia Clarion Electronics: Cockpit Entertainment Controller



- Development Plan 2025 of Faurecia Clarion Electronics: Display Technology
- Development Plan 2025 of Faurecia Clarion Electronics: Haptic and Sensory Experience Solutions
- Development Plan 2025 of Faurecia Clarion Electronics: Driver Assistance System
- R&D Outsourcing and Layoff Plan of Faurecia Clarion Electronics
- Efficient Organizational Structure of Faurecia Clarion Electronics
- Faurecia Cockpit Electronic Product Lines
- Faurecia Cockpit Intelligence Platform (CIP): Single-processor Multi-screen Integrated System
- Faurecia Cockpit DCU Business: Multi-screen Integrated Cockpit System
- Goals of Faurecia Cockpit DCU Plan
- DCU Chip: Renesas R-Car H3
- DCU Chip: Chip T7 of Allwinner Technology
- DCU Chip: Horizon Robotics Journey? 2 Chip
- Faurecia IVI System
- Faurecia Vehicle Navigation System
- IVI System Co-developed by Faurecia and Phoenix Auto Intelligence for Changan C75 Plus
- Faurecia's Customizable Vehicle Display Business
- Faurecia's Customizable Vehicle Display Business Planning
- Large Lifiable Display Jointly Released by Faurecia and JDI
- Faurecia Electronic Rearview Mirror
- Faurecia 12.3-inch Cold-rolled Display for Aion LX of GAC NE
- Faurecia Android App for Automotive Market
- Faurecia's Instrument, Center Console and Other Cockpit Products for GAC Trumpchi GS5
- Faurecia's Instrument, Center Console and Other Interiors for Tesla Model 3 in North America
- Faurecia Future Cockpit Product Lines
- Faurecia Future Cockpit




- Faurecia Immersive Sound System
- Faurecia HMI Solution
- Faurecia Seamless Connectivity and Infotainment Solutions
- Faurecia Cockpit Cooperation Ecosystem
- Summary of Faurecia Intelligent Cockpit Product Planning and Technology Roadmap
- Faurecia FIRST INCH Smart Control Unit
- Summary of Faurecia Integrated Control Panel Planning and Technology Roadmap
- Faurecia V2X Solution
- Faurecia Automated Parking Solution
- Faurecia Autonomous Pick-up Solution
- Faurecia Surround View System Solution
- Summary of Faurecia Automated Parking Product Planning and Technology Roadmap
- Faurecia Driver Monitoring System (Interior Monitoring System) with Haptic Feedback
- Summary of Faurecia DMS Product Planning and Technology Roadmap
- Faurecia Cloud Connectivity Solution
- Faurecia OTA Solution
- Faurecia Investment in Guardknox for Layout of Vehicle Cyber Security Solution
- Faurecia Cockpit Interior Lighting - Ambient Lamp
- Faurecia Seat Business
- Faurecia Active Wellness 2.0 Seat and Rotating Seat
- Faurecia New Intelligent Seat Patent in China
- Faurecia Interiors for BAIC BJEV ARCFOX α-T Intelligent Cockpit
- Faurecia Zero Emission System Division
- Faurecia Zero Emission System Division
- Faurecia Cooperation Ecosystem

Summary of Faurecia Cockpit Products, Suppliers and Customers  
Global Core Team of Faurecia  
Core Team of Faurecia in China  
Production Base Layout of Faurecia Clarion Electronics in China

### **6. Panasonic Cockpit Business (48 Pages)**

Panasonic Business Structure and R&D  
Panasonic Key R&D Bases in China  
Distribution of Main R&D Bases of Panasonic Automotive Electronics Business  
Panasonic Automotive Electronics Business Structure and Product Lines  
Main Business of Panasonic Automotive Systems Development Tianjin Co., Ltd.  
Panasonic Cockpit Electronic Product Lines  
Panasonic SPYDR Cockpit DCU Business  
Panasonic Cockpit DCU Solution: SPYDR 2.0/SPYDR 3.0  
Panasonic Cockpit Electronics Layout  
Panasonic Cockpit Electronics Computing Architecture  
Panasonic Cockpit System Software Architecture  
DCU Chip: Qualcomm SA6155P/SA8155P Processor  
Panasonic IVI Operating System - Skip Gen  
Panasonic IVI System - PIVI Pro for New Land Rover Defender  
Panasonic IVI System Business  
Panasonic New Multi-display Interaction Products  
Panasonic Dual-display Interaction Products for Range Rover Velar  
Panasonic HUD for Nissan SKYLINE  
Panasonic Develops AR-HUD



- Panasonic AR-HUD Applied to Toyota Concept Car
- Panasonic Intelligent Cockpit Products
- Panasonic Contactless Intelligent Cockpit
- Panasonic Intelligent Cockpit for Autonomous Vehicles
- Summary of Panasonic Intelligent Cockpit Development Planning and Technology Roadmap
- Panasonic FICOSA T-BOX Business
- Panasonic FICOSA V2X Technology Roadmap
- Features of Panasonic FICOSA V2X Technology -- DSRC V2V/V2I)
- Features of Panasonic FICOSA V2X Technology -- DSRC V2P
- Features of Panasonic FICOSA V2X Technology -- Integration of Radar and DSRC Technology
- Panasonic FICOSA C-V2X Products
- Application of Panasonic FICOSA C-V2X Technology
- Panasonic AVP Business
- Technical Features of Panasonic AVP Products
- Panasonic Automated Parking Product Planning and Technology Roadmap
- Panasonic DMS Business
- Summary of Panasonic DMS Product Planning and Technology Roadmap
- Panasonic BMS Business
- Panasonic New Battery Management Technology Which May Be Applied to Vehicles in Future
- Summary of Panasonic Cockpit Products, Suppliers and Customers
- Core Team of Panasonic
- Distribution of Main Production Bases of Panasonic Automotive Electronics Business

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