

China Automotive Intelligent Rearview Mirror Industry Report, 2020

August 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

Regulations and ADAS Help Intelligent Rearview Mirror Market Blossom

In our report China Automotive Intelligent Rearview Mirror Industry Report, 2020, we analyze and research the status quo of the industry and the suppliers (including exterior electronic rearview mirror, streaming media rearview mirror and intelligent cloud mirror).

Exterior electronic rearview mirror: as European Union and Japan loosen their regulations, passenger car manufacturers race to test the waters.

As European Union and Japan relaxed their regulatory restrictions in 2016 and 2017, separately, exterior electronic rearview mirror market gained pace there. OEMs like Audi, Lexus, Honda and Koenigsegg have introduced mature applications successively.

In China where exterior electronic rearview mirrors are still not allowed to replace conventional ones, suppliers find another way out: combining exterior electronic rearview mirror and usual one as a solution to complement commercial vehicle vision system. At present, two Chinese bus giants Yutong Bus and King Long have made product layout; in 2020 BYD rolled out a city electric bus – K9 packing exterior electronic rearview mirrors.

Foreign Vehicle Models with Electric Exterior Rearview Mirrors

Model	Launch Time	Picture
Lexus ES	Oct. 2018	
Audi e-tron	Dec. 2018	
Koenigsegg Gemera	Mar. 2020	
Honda e	2020	
Mercedes-Benz Actros	Jun. 2019	

Chinese Vehicle Models with Exterior Electronic Rearview Mirrors

Model	Launch Time	Picture
BYD K9	Jul. 2020	
Yutong U10	Jul. 2020	
King Long Apolong	Nov. 2018	

Foreign suppliers of exterior electronic rearview mirrors are led by Valeo, Magna, Tokai Rika and Bosch, all of which take the mirror as an essential part of ADAS or intelligent driving system.

In China, typical suppliers are Shanghai Yuxing Electronics and Zhengzhou Senpeng Electronic Technology, of which the former has provided exterior electronic rearview mirror + conventional rearview mirror integrated solution for Yutong Bus, so has Senpeng Electronic done for BYD K9. In June 2020, Yuxing Electronics and Metoak Technology (Beijing) forged strategic partnership in the aspects of blind spot visualization and risk warning by exterior electronic rearview mirror, a kind of camera monitor system (CMS). This means automotive rearview mirror solutions of Chinese suppliers are fusing with ADAS system.

Streaming media rearview mirror: more and more vehicle models pack it.

Streaming media rearview mirror market has been tepid since it was installed onto OEM models in 2015. Despite a penetration of not higher than 0.5% during 2018-2019, streaming media rearview mirrors have been mounted on a growing number of OEM models (e.g., Hongqi, Besturn, Buick, Land Rover and Toyota) between 2019 and 2020, thanks to the popularity of smart cockpits. Some models gave eye-catching performance after general availability on market. Examples include Buick GL8 with 16,580 units sold in just two months after launch in May 2020, including up to 72.5% with streaming media rearview mirrors. It is predicted that the penetration of streaming media rearview mirrors in the Chinese passenger car market will outstrip 1% in 2020.

Brands (Models) with Streaming Media Rearview Mirrors, 2019-2020

2019 Model	2020 Model
Hongqi (Hongqi HS5)	Buick (GL8, Regal, Lacrosse, Envision S, Enclave)
Land Rover (Jaguar XEL)	Hongqi (Hongqi H9)
Besturn (T99, X40)	GAC Toyota (Wildlander)
Toyota (Vellfire)	Land Rover (Defender, Discovery Sport)
Jetour (X90)	Toyota (Alphard)
	Lexus (LM)

Considering it is easy to install in vehicles, streaming media rearview mirror holds the trends as follows:

- Support such AI technologies as face recognition and iris recognition for personalized layout in OEM models;
- Show what exterior electronic rearview mirrors display, reducing screens in a vehicle;
- Fuse with other capabilities, e.g., ETC, offering more convenient driving experience.

Gentex Full Display Mirror with Iris Recognition Technology



CMS Solution Incorporating Gentex Streaming Media Rearview Mirror and Exterior Electronic Rearview Mirrors



Toshiba Intelligent Rearview Mirror with ETC



Intelligent Cloud Mirror: The market is burgeoning, and product functions get enriched

From 2015 to 2019, China's private car ownership soared from 130 million to 240 million units, triggering huge demand for smart cloud mirrors in the aftermarket.

Currently, smart cloud mirror vendors highlight such capabilities of their product as ADAS alerts and intelligent voice interaction. JADO and 70mai have launched streaming media rearview mirrors and smart cloud mirror all-in-ones that support the simultaneous recording of front and rearview mirrors. In brief, smart cloud mirrors evolve from driving recorders, and now are integrated with streaming media rearview mirrors, ADAS and intelligent voice.

Internet giants such as Baidu, 360, and Xiaomi have entered the smart cloud mirror market through complete product solutions, and Alibaba has made its foray by AliOS. The market competition picks up with the involvement of these internet tycoons.

Smart Cloud Mirror and Streaming Media Rearview Mirror Integrated Machines of JADO and 70mai



Comparison of Representative Smart Cloud Mirrors

Product	Intelligent Voice Interaction	ADAS	Backup Camera	Driving Recorder
360 smart rearview mirror - S650	√	√	√	√
MI Home smart rearview mirror	√	√	√	√
DuMirror smart rearview mirror	√	√	×	√
70mai smart rearview mirror	√	√	√	√
JADO smart rearview mirror	√	√	√	√
Blackview smart rearview mirror	√	√	√	√
MapGoo smart rearview mirror - X8S	√	√	√	√

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5.2.1 Profile

5.2.2 Intelligent Rearview Mirrors

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5.3.1 Profile

5.3.2 Intelligent Rearview Mirrors

5.3.3 Supply to Clients

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5.4 Ficosa

5.4.1 Profile

5.4.2 Intelligent Rearview Mirrors

5.5 Tokai Rika

5.5.1 Profile

5.5.2 Intelligent Rearview Mirrors

5.6 Samvardhana Motherson Group

5.6.1 Profile

5.6.2 Intelligent Rearview Mirrors

5.7 Foryou Corporation (ADAYO)

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5.8 Yuxing Electronics

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5.12 Shenzhen Roadrover Technology

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6 Intelligent Rearview Mirror Chip Vendors

6.1 All Winner Technology

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