

AutomotiveUltrasonicRadar and OEM ParkingRoadmapDevelopmentResearch Report, 2023

Apr. 2023

As a single vehicle is expected to pack 7 units in 2025, ultrasonic radars will take the fast lane.

According to the statistics of ResearchInChina, the ultrasonic radars installed in new passenger cars in China swelled by 7.4% year on year from 100.09 million units in 2021 to 107.525 million units in 2022. It is expected that the installation will exceed 140 million units by 2025. From 2021 to January 2023, there were an increasing number of ultrasonic radars installed in a single vehicle, up from 4.9 units to 5.6 units. Thanks to factors such as largescale application of driving and parking integration, and the integration of cockpit and parking, it is expected that ultrasonic radars per vehicle will rise to 7 units in 2025, and the ultrasonic radar market will enjoy a boom.

Installations of Ultrasonic Radars in Passenger Cars in China, 2021-2025E (10,000 Units)



Source: ResearchInChina





Installation Structure of Ultrasonic Radar Solutions, 2021-Jan. 2023

In terms of installed solutions, in 2022, 36.8%, 20.6% and 21.8% of new passenger cars in China carried 4-, 8- and 12-ultrasonic radar solutions, respectively; AVP used 12-ultrasonic radar solutions. In 2022, 28,804 vehicles with AVP were sold, rocketing by 589% on the previous year.

Source: ResearchInChina



Amid the growth in installations and demand, ultrasonic radar technology is also advancing, and has iterated to AK2 ultrasonic radar. Compared with conventional ultrasonic radars, AK2 ultrasonic radar offers the following benefits:

Longer detection range (>5m), smaller blind spot (<10cm).

More echoes: DSI3 communication mode is adopted, providing the highest rate of signal propagation, up to 444kbit/s; at most 230 echoes can be supported in a sensor detection cycle.

Anti-interference

ASIL-B

Waveform coding

Multi-mode switching (for example, Longhorn AK2 supports three transmission modes: fixed frequency mode, rising delta frequency mode and falling delta frequency mode) Diagnosis function (for example, Bosch's sixth-generation ultrasonic radar can detect hardware deafness).

Comparison between AK2 Ultrasonic Radar and Existing Ultrasonic Radars

	Existing Ultrasonic Radars	AK2 Ultrasonic Radar	
Longest detection range	450cm	>500cm	
Blind spot	<20-25cm	0~10cm	
Ranging accuracy	≤5cm	≤1cm	
Ranging resolution	1cm	≤1cm	
Functional safe <mark>ty</mark>	QM	ASIL B	
Sensor deafness detection	Unable to detect	Special diagnosis function	
Coverage detection (ice, snow, etc.)	Low detection probability	Special diagnosis function	
Sonic encryption	Fixed frequency	Frequency modulation	
Connection mode	P2P	P2P (DSI3 Bus)	
Sensor structure	No standard	Standard size	
Operating temperature	-40 ~ 80℃	-40 ~ 95℃	

Source: EnjoyMove Technology



AK2 layout

Regarding the AK2 layout, foreign manufacturers started earlier than Chinese companies. In 2016, Bosch successfully developed the sixth-generation ultrasonic radar, which combines digital signals and signal codes together and enables sensors to achieve multiple receptions and multiple transmissions through a linear frequency. Continental's full-stack solution based on its CUS3 ultrasonic sensor (with longest detection range of 5.5m, and self-diagnosis capability) is planned to be produced in quantities in 2024. The next-generation products of Murata Manufacturing can be used together with the ElmosE 524.17 driver chip to support frequency conversion (coding), with the blind spot only covering 15cm, and the longest detection range of 5.5m.

In China, both Audiowell Electronics and ZongMu Technology mass-produced AK2 radar in 2022; Coligen and Suzhou UDAS plan mass production in 2023; the rest companies are developing or have successfully developed AK2 radar.

Among them, the second-generation coded ultrasonic sensor of ZongMu Technology meets the German AK2 sensor appearance design standard. Through the Chirp (linear frequency modulation) coded transmission mode, the self-developed point cloud perception algorithm and probe enable the anti-noise capability of the system, with the refresh cycle in the encoding mode less than 100ms. The signal envelope helps to improve the detection of low obstacles such as ground locks and limiters. The product supports such functions as parking space monitoring, emergency braking, automatic space detection, target clustering and generation, and adaptive compensation of sensor performance parameters. The AK2 sensor was mass-produced in the second quarter of 2022, supporting customers like JAC Group, Voyah, Changan Automobile (Changan APA 7.0) and Seres.

AK2 Ultrasonic Sensor of ZongMu Technology



Source: ZongMu Technology



Comparison of AK2 Coded Ultrasonic Radar Layout between Chinese Manufacturers

Manufactu rer	SOP	Key Features	Functions	Supported Models
Audiowell Electronic S	2022	Synchronous processing of multiple echo eigenvalues, multi-mode switching. BK FM bandwidth, simultaneous transmission and reception of different acoustic signals for avoiding frequency interference.	 Longest detection range: 7 m; ranging accuracy: ±2 cm; resolution: 1cm. Minimum blind spot: 15 cm. Enable UPA and APA functions via single sensor. Realize parking functions such as APA and automated parking; HPP will be possible in the future. 	SAIC-GM, Chery, Lotus, etc.
Coligen	2023	Mainly for autonomous driving	Detection range: 0.15-6m	-
Longhorn	2022 (launched)	The software architecture and interface comply with Autosar standards. Three transmission modes: fixed frequency mode, rising delta frequency mode and falling delta frequency mode. Multiple echo events, multiple transmissions and multiple receptions.	 Longest detection range: 7m. Detection accuracy: 1cm. Blind spot:<10cm Used for automated parking, automatic braking, accelerator misstep prevention and other functions; Diagnosis function: detect the failure of the ultrasonic sensor when it is covered with ice, mud and snow. 	-
ZongMu Technolog Y	Q2 2022	Enable anti-noise capability of the system in the Chirp (linear frequency modulation) coded transmission mode. Compliant with German AK2 sensor appearance design standard; high universal interchangeability. The self-developed point cloud perception algorithm and probe allow for long-distance detection and wide FOV. The refresh cycle in encoding mode is less than 100ms.	 360° perception within 5.5m around the vehicle body. Parking space detection and autonomous emergency braking (AEB). Freespace detection, target clustering and generation, obstacle detection and object classification. Adaptive compensation of sensor performance parameters and other functions. 	JAC Group, Voyah, Changan Automobile and Seres
Hefei Softec Auto Electronic	July 2021 (launched)	Auto-encoding, auto-thresholding, near-field data collection. High robustness and good diagnosis capability; automatic measurement of aftershock time and frequency; integration of temperature sensor and DSI3 communication interface.	Blind spot detection, automatic pull-in/out, and LAEB/PDC.	SAIC
ForVision	Mass- produced	-	Alarm function.	-
Thunders oft	Developed successfully	-	Detection range: 7m.	-
Shanghai Baolong	Developed successfully	Long-range blind spot detection	Longest detection range: 10m	-
UDAS	October 2023	Anti-interference at the same frequency	 Longest detection range: 8m. Adapt to AVP and other autonomous driving systems above L3 	In Dec. 2022, designated by a new energy vehicle brand in China for its brand-new platform model.

Source: ResearchInChina



In recent years, ultrasonic sensors have faced challenged from radars. For example, in 2022, O-Film Tech introduced a solution of applying radars to low-speed autonomous driving for the purpose of space perception, and enabled the parking function using its self-developed 77Ghz radar. In 2022, TransMicrowave unveiled a short-range point cloud imaging radar, which can output 4D (X, Y, Z, V) point cloud information and enables automated parking in the 4D point cloud AVP mode, with the localization accuracy of 2cm. Tesla even announced to globally remove ultrasonic radars from Model X and Model Y since 2023. Does this mean that ultrasonic radars will be replaced or no longer needed?

On the one hand, ultrasonic radars have a big cost advantage in short-distance ranging, and gain ever more competitive edges. Besides the iteration of AK2 ultrasonic sensor, ultrasonic radars tend to be miniaturized and hidden. One example is AW101, a MEMS ultrasonic sensor developed by Audiowell Electronics in November 2022, mainly used for rear occupant alert (ROA), sound controlled by gesture, VR&AR and so forth. The MEMS ultrasonic sensor is a new kind of sensor that integrates piezoelectric thin films (as functional thin films) with silicon-based MEMS for miniaturization, integration, and hidden installation. The micron-level functional films and millimeter-level devices of the sensor facilitate further integration, compounding and arraying, and make it easy to design SiP and SoC devices and built circuits in.

On the other hand, ultrasonic sensors are finding application in more scenarios from parking to in-cabin monitoring. For example, Coligen is expanding the application of ultrasonic sensors in wading warning, height limit warning, low-speed F/RAEB, load warning, reverse drive assist, and AVP based on multi-sensor fusion; Suzhou UDAS is also exploring the use of ultrasonic sensors in low-speed AEB, and high-speed lane change and blind spot detection.

Besides, multi-sensor fusion represents the development trend of autonomous driving technology. At present, vehicle intelligence is undergoing "cockpit and parking integration" and "driving and parking integration", and will see "cockpit and driving integration" soon. For them, ultrasonic radars should be integrated with different sensors to achieve different levels of functions. Examples include automated parking, enabled by "ultrasonic radars + surround view cameras" in the "cockpit and parking integrated" architecture; navigate on pilot and homezone parking pilot, enabled by "ultrasonic radars + multi-view cameras + radars" in the "driving and parking integrated" architecture; urban/end-to-end navigate on pilot, homezone parking pilot (across floors) and L2 AVP, enabled by "ultrasonic radars + multi-view cameras + radars" in the "cockpit and driving integrated" architecture.



Table of Content (1)

1 Automotive Ultrasonic Radar and Application Scenarios

1.1 Overview of Automotive Ultrasonic Radar

1.1.1 Overview and Features

1.1.2 System Composition and Working Principle

1.1.3 Main Types

1.1.4 Technical Solutions

1.1.5 Industry Chain

1.1.6 Application Scenarios

- 1.2 Automotive Ultrasonic Radar Parking Scenarios
- 1.2.1 Development History of Parking
- 1.2.2 Automated Parking Assist (APA)
- 1.2.3 Remote Parking Assist (RPA)
- 1.2.4 Homezone Parking Pilot (HPP)
- 1.2.5 Lane-tracking Reversing Assistance System (LRAS)
- 1.2.6 Automated Valet Parking (AVP)
- 1.2.7 Highway Side Assist

2 Automotive Ultrasonic Radar Installations and Solution Comparison in China

- 2.1 Installations of Ultrasonic Radars in Passenger Cars in China
- 2.1.1 Overall Installations of Ultrasonic Radars, 2021-2023
- 2.1.2 Installations of Ultrasonic Radars, 2021-2023: By Chinese Independent/Joint Venture/Emerging Automaker
- 2.1.3 Installations of Ultrasonic Radars, 2021-2023: By Price
- 2.1.4 Installations of Ultrasonic Radars, 2021-2023: By Brand
- 2.1.5 Installations of Ultrasonic Radars Per Vehicle, 2021-2023: Overall and by
- Chinese Independent/Joint Venture/Emerging Automaker
- 2.1.6 Installations of Ultrasonic Radars Per Vehicle, 2021-2023: By Price

2.1.7 Ultrasonic Radar Installation Schemes: By Number of Radars Installed2.1.8 Ultrasonic Radar Installation Schemes: By Autonomous Driving Level2.1.9 Ultrasonic Radar Installation Schemes: By Lowly/Medium/Highly ConfiguredModel

- 2.1.10 TOP20 Models Installed with 4 Ultrasonic Radars by Sales
- 2.1.11 TOP20 Models Installed with 8 Ultrasonic Radars by Sales
- 2.1.12 TOP20 Models Installed with 12 Ultrasonic Radars by Sales
- 2.2 Comparison between Ultrasonic Radar Solutions for Passenger Cars
- 2.2.1 Major Ultrasonic Radar Suppliers
- 2.2.2 Comparison of Technologies and Product Solutions between Major Foreign Suppliers
- 2.2.3 Comparison of Products and Technical Strength between Major Domestic Suppliers
- 2.2.4 Comparison between Ultrasonic Radar Business Models in China

3 Development Trends of Automotive Ultrasonic Radar and Parking in China

- 3.1 Trend 1
- 3.1.1 Ultrasonic Radar Market Forecast, 2020-2025
- 3.1.2 Ultrasonic Radar Application Scheme Forecast, 2020-2025

- 3.2.1 Features of AK2 Coded Ultrasonic Radar
- 3.2.2 Coded Ultrasonic DSI Communication Technology
- 3.2.3 Overview of Coded Ultrasonic Chips
- 3.2.4 Application Scenarios of AK2 Coded Ultrasonic Radar
- 3.2.5 Layout Comparison of AK2 Coded Ultrasonic Radars between Foreign Suppliers



^{3.2} Trend 2

Table of Content (2)

- 3.2.6 Layout Comparison of AK2 Coded Ultrasonic Radars between Chinese Suppliers 3.3 Trend 3
- 3.3.1 MEMS Ultrasonic Radar
- 3.4 Trend 4
- 3.5 Trend 5
- 3.6 Trend 6
- 3.6.1 Development Background and Advantages of Driving-parking Integration 3.6.2 Summary of Driving-parking Integrated Solutions

3.7 Trend 7

3.7.1 Development Background of Cockpit-parking Integration: Iteration of Parking Functions

- 3.7.2 Advantages of Cockpit-parking Integration
- 3.7.3 Summary of Cockpit-parking Integrated Solutions

3.8 Discussion of Trends: Will Ultrasonic Radars Be Replaced by Millimeter Wave Radars?

4 Parking Routes & Ultrasonic Radar Installation Schemes of OEMs

4.1 Overview of Passenger Car Parking Solutions of OEMs

- 4.1.1 OEMs' Typical Brands and Models Supported by APA Solutions, 2022
- 4.1.2 OEMs' Typical Brands and Models Supported by Integrated APA Solutions, 2022
- 4.1.3 OEMs' Typical Brands and Models Supported by RPA Solutions, 2022
- 4.1.4 OEMs' Typical Brands and Models Supported by HPA & AVP Solutions, 2022

4.2 BMW

4.2.1 Ultrasonic Radar Installations & Installation Scheme

4.2.2 Development Route of Automated Parking 4.2.3 Parking Assistant Plus

4.3 Mercedes-Benz

4.3.1 Ultrasonic Radar Installations & Installation Scheme

- 4.3.2 Development Route of Automated Parking
- 4.3.3 L4 Parking System: Automated Valet Parking Project (Put into Trial Operation in 2019)

4.3.3 L4 Parking System: Automated Valet Parking Project (Displayed in 2022)

4.4 Ford

4.4.1 Ultrasonic Radar Installations & Installation Scheme

- 4.4.2 Development Route of Automated Parking System
- 4.4.3 On-button Parking Assist (APA2)
- 4.4.4 Automated Valet Parking System
- 4.4.5 Vision Fused Fully Automated Parking (APA5.0)

4.5 GM

- 4.5.1 Ultrasonic Radar Installations & Parking Solutions
- 4.5.2 Development Route of Automated Parking System
- 4.5.3 Intelligent FAPA System
- 4.5.4 360° Full Mode Intelligent Parking System
- 4.5.5 Supervised Remote Parking (SRP)

4.6 Honda

- 4.6.1 Ultrasonic Radar Installations & Parking Solutions
- 4.6.2 Development Route of Automated Parking System
- 4.6.3 Park Assist (PA)



Table of Content (3)

4.7 Volkswagen

4.7.1 Ultrasonic Radar Installations & Installation Scheme

- 4.7.2 Parking System Development Route
- 4.7.3 Intelligent Park Assist (IPA)

4.8 Great Wall Motor

4.8.1 Ultrasonic Radar Installations & Parking Solutions4.8.2 Development Route of Automated Parking4.8.3 Fully Automated Integrated Parking System

4.8.4 All-scenario Intelligent Parking System

4.9 Changan Automobile

4.9.1 Ultrasonic Radar Installations & Installation Scheme4.9.2 Development Route of Automated Parking4.9.3 APA6.04.9.4 APA7.0

4.10 Geely

4.10.1 Ultrasonic Radar Installations & Installation Scheme
4.10.2 Development Route of Automated Parking
4.10.3 APA + Automated Parking
4.10.4 Remote Parking Assist (RPA)
4.10.5 5G-AVP 1km Autonomous Parking

4.11 FAW Hongqi4.11.1 Ultrasonic Radar Installations & Installation Scheme4.11.2 Development Route of Automated Parking

4.11.3 APA Functions

- 4.11.4 L4 Valet Parking System
- 4.11.5 Autonomous Driving Development Planning

4.12 GAC Aion

- 4.12.1 Ultrasonic Radar Installations & Installation Scheme
- 4.12.2 Development Route of Automated Parking
- 4.12.3 FAPA
- 4.12.4 RPA
- 4.12.5 HPP

4.13 BAIC

4.13.1 Ultrasonic Radar Installations & Parking Solutions

4.13.2 Development Route of Automated Parking

4.13.3 RPA on ARCFOX α

4.14 BYD

4.14.1 Ultrasonic Radar Installations & Installation Scheme4.14.2 Development Route of Automated Parking4.14.3 FAPA

4.15 Dongfeng Motor
4.15.1 Ultrasonic Radar Installations & Installation Scheme
4.15.2 Development Route of Automated Parking
4.15.3 APA & RPA
4.15.4 FAPA



Table of Content (4)

4.16 Xpeng Motors

4.16.1 Ultrasonic Radar Installations & Installation Scheme
4.16.2 Development Route of Automated Parking
4.16.3 Automated Parking System
4.16.4 Homezone VPA for Parking Lots
4.16.5 Homezone VPA-L for Cross-floor Parking Lots
4.16.6 Parking Function in Xpeng Smartphone APP

4.17 NIO

4.17.1 Ultrasonic Radar Installations & Parking Solutions4.17.2 Development Route of Automated Parking4.17.3 Fully Automated Integrated Parking System

4.18 Li Auto

4.18.1 Ultrasonic Radar Installations & Installation Scheme4.18.2 Development Route of Automated Parking4.18.3 Automated Parking System

4.19 Weltmeister

- 4.19.1 Ultrasonic Radar Installations & Installation Scheme
- 4.19.2 Development Route of Automated Parking
- 4.19.3 AVP Autonomous Parking System
- 4.19.4 HAVP Autonomous Parking System
- 4.19.5 PAVP Autonomous Non-learning Valet Parking System

4.20 Neta Auto

4.20.1 Ultrasonic Radar Installations & Installation Scheme

4.20.2 Development Route of Automated Parking4.20.3 Automated Parking + One-button Parking4.20.4 TA PILOT 4.0

5 Foreign Automotive Ultrasonic Radar Companies

- 5.1 Bosch
- 5.1.1 Profile
- 5.1.2 Development Route of Ultrasonic Radar Products
- 5.1.3 Overview of 6th Generation Ultrasonic Radar
- 5.1.4 Application of Ultrasonic Radars
- 5.1.5 Evolution Route of Automated Parking
- 5.1.6 Overview of APA and RPA
- 5.1.7 Overview of HPA and AVP
- 5.1.8 Dynamics in AVP Cooperation
- 5.1.9 Cockpit-parking Integration Roadmap
- 5.1.10 Cockpit-parking Integrated Solutions

5.2 Valeo

- 5.2.1 Profile
- 5.2.2 Development Route of Ultrasonic Radar
- 5.2.3 Evolution Route of Automated Parking System
- 5.2.4 Automated Parking Products: Overview of Park4U
- 5.2.4 Automated Parking Products: Fusion Park4U
- 5.2.4 Automated Parking Products: Remote Park4U
- 5.2.4 Automated Parking Products: Valet Park4U
- 5.2.5 Dynamics in Automated Parking Cooperation



Table of Content (5)

5.3 Continental

5.3.1 Profile

5.3.2 Development Route of Autonomous Driving

5.3.3 Ultrasonic Radar Products

5.3.4 Automated Parking Layout History

5.4 Nicera

5.5 Murata

5.5.1 Profile

5.5.2 Development Roadmap of Ultrasonic Products 5.5.3 Automotive Ultrasonic Radar Products

5.6 Denso 5.6.1 Profile 5.6.2 Ultrasonic Radar Products

5.7 Hyundai Mobis
5.7.1 Profile
5.7.2 Ultrasonic Radar Products
5.7.3 Automated Parking & Remote Smart Parking Assist (RSPA)
5.7.4 Mobis Parking System (MPS)
5.7.5 Automated Valet Parking (AVP)

6 Chinese Automotive Ultrasonic Radar Companies

6.1 Audiowell

- 6.1.1 Profile
- 6.1.2 Ultrasonic Products Business Model and Technology

6.1.3 Ultrasonic Radar Product Lineup and Major Customers

6.1.4 Iteration of Ultrasonic Radar Products

6.1.5 Overview of AK2 Digital Ultrasonic Radar

6.1.6 MEMS Ultrasonic Sensor Technology

6.1.7 Features and Application of MEMS Ultrasonic Sensor

- 6.2 Coligen
- 6.2.1 Profile

6.2.2 Business Model

- 6.2.3 Development History of Automotive Ultrasonic Products
- 6.2.4 Automotive Ultrasonic Radar Products and Technologies
- 6.2.5 Major Customers of Automotive Ultrasonic Radar System
- 6.2.6 Evolution Roadmap for Parking Products
- 6.3 Longhorn Automotive Electronic Equipment
 6.3.1 Profile
 6.3.2 Business Model and Technology
 6.3.3 Automotive Ultrasonic Radar Products
 6.3.4 New-generation Coded Wave Sensor
 6.3.5 Major Customers of Automotive Ultrasonic Radar
- 6.4 TungThih Electronic
- 6.4.1 Profile
- 6.4.2 Development History of Ultrasonic Products and Strategy
- 6.4.3 Development Route of Automated Parking System

6.5 Hangsheng Electronics6.5.1 Profile6.5.2 ADAS Products



6.6 ZongMu Technology
6.6.1 Profile
6.6.2 Coded Ultrasonic Radar
6.6.3 Ultrasonic Radar Solutions
6.6.4 Driving-parking Integrated Architecture
6.6.5 Major Customers and Dynamics in Cooperation

6.7 Whetron Electronics6.7.1 Profile6.7.2 Ultrasonic Radar Application and Cooperation

6.8 Softec6.8.1 Profile6.8.2 Ultrasonic Radar Products

6.9 Hikvision6.9.1 Profile6.9.2 Cooperation on Passenger Car Electronics and Driving-parking Integration6.9.3 Commercial Vehicle Electronics

6.10 ForVision6.10.1 Profile6.10.2 Ultrasonic Radar Products and Solutions6.10.3 Ultrasonic Radar Application Cases

6.11 Suzhou UDAS
6.11.1 Profile
6.11.2 Ultrasonic Radar Products and Cooperation
6.11.3 Parking Solutions and Major Customers
6.11.4 Other Ultrasonic Radar Solutions

6.12 Baolong Automotive6.12.1 Profile6.12.2 Ultrasonic Radar and Parking Products6.12.3 Dynamics in Cooperation

6.13 Shunhe Electric Technology6.13.1 Profile6.13.2 Ultrasonic Radar Products6.13.3 Parking Solutions6.14 Chongqing Guangda Industrial6.15 Ubidriving





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