

Two-wheeler Intelligence and Industry Chain Research Report, 2023

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In recent years, two-wheelers have headed in the direction of intelligent connection and intelligent driving, which has been accompanied by consumption upgrade, and mature applications of big data, artificial intelligence (AI), Internet of Things, 5G and other technologies. In the early stage of intelligence, it is necessary to transfer technology from smart products and intelligent vehicles to MCUs, chips, big intelligent screens, automotive electronics, software and operating systems. Based on the successful experience in vehicle intelligence, some automakers therefore have begun to deploy two-wheelers in hope of expanding new business amid the automotive market saturation.

1. Electric two-wheeler intelligence

Electric two-wheelers use IoT technology for remote unlocking and mobile APP interconnection, AI big data computing for higher battery safety and precise range, and GPS/Beidou positioning technology for anti-theft, which has been a standard configuration in high-end brands of top manufacturers. Internet brand electric vehicle manufacturers such as Niu Technologies and Segway-Ninebo have even started installing cameras, ultrasonic sensors and other sensors to enable riding assistance functions such as ACC and collision warning to gain differentiated competitive edges.

2. Motorcycle intelligence

Motorcycles are becoming "intelligent", and telematics, adaptive cruise control (ACC), forward collision warning (FCW), blind spot detection (BSD) and other functions are finding their way into the motorcycle industry.

For example, in September 2023 Qianjiang Motorcycle released QJ PILOT, an Al-driven riding assistance system which combines intelligent hardware and software. It has such functions as monitoring, warning, and safety protection, and also enables language communication between people and vehicles through voice interaction to complete audio navigation, vehicle control and other tasks.



Manufacturer	Yadea	Aima	TAILG	Segway- Ninebo	Niu Technologies
Operating system	YADEA OS Wisdom Center (self-developed on NXP platform)	Aim OS + Huawei HarmonyOS	Huawei HarmonyOS	RideyFun Intelligent Control System	NIU CLOUD ECU
Intelligent center console	Intelligent vehicle control, intelligent riding APP, smart sleep, automatic headlights, etc.	The data interactions between vehicles and mobile phones, between the cloud and the backend provide users with customized intelligent functions in different scenarios.	The display on the mobile phone is synchronize d to the big screen to show navigation, movies and music.	Music, navigation and phone calls, weather warning system, connection with APP through Bluetooth.	Phone mirroring of navigation, phone calls
Smart vehi <mark>cle</mark> lock	Mobile phone APP, voiceprint unlocking, NFC, Bluetooth, key sharing, and seat bucket unlocking via mobile phone	ile phone Mobile phone APP, Mobile phone APP, NFC, Bluetooth, phon king, NFC, key sharing NFC ng, and bucket king via le phone		Mobile phone APP, NFC, Bluetooth, key sharing, and seat bucket unlocking via mobile phone	Mobile phone APP, password unlocking, NFC, Bluetooth, key sharing, and seat bucket unlocking via mobile phone
Intelligent anti- theft Real-time positioning, abnormality alert, electronic fence, sentry mode		Real-time positioning and abnormality alert	Real-time positioning and electric fence	Real-time positioning, abnormality alert and electronic fence	Real-time positioning, abnormality alert, electronic fence, battery anti-theft
Riding assistance	Driving recorder, boost	-	-	ABS, TCS, cruise control, boost	One-button reversing, one- button repair, cruise control, boost, ramp parking, ABS, TCS, and dual driving recorder (collision pre-recording).

Intelligence of Some Electric Two-Wheeler Manufacturers

Source: ResearchInChina



Manufactur er	Intelligent System	Release Time	Composition				
BMW	Radar system	Radar system: 2	 Radar system: front collision warning, ACC, lane change warning, SOS (available in 2024 BMW motorcycles, standard on some models); 				
	BMW Motorrad Connected	Jul. 2020	 BMW Motorrad Connected: Wireless Bluetooth is used to intelligently connect the motorcycle, smartphone and helmet, and the multi-controller ensures that the functions are easy to operate at all times. 	Qianjiang	QJ PILOT	Sept. 2023	 Intelligent control: adopt own automotive-grace core modules and implement through the full self-developed software system solution, with monitoring and warning functions; Intelligent interactive system: realize the react time interconnection between cyclists, vehicle and intelligent devices, and allow users to control
Kawasaki	Rideology AI System	Developed in Sept. 2016	 Rideology App: connected with the intelligent instrument panel of Kawasaki motorcycles, it provides real-time vehicle information, driving records, route planning, vehicle diagnosis and other functions 				 Exclusive ecosystem: exclusive scenar navigation, DVR/weather/entertainment/Af customization. Personal status can be share through the cloud.
	Advanced Rider Assist System (ARAS)	Co-developed with Bosch in Nov. 2019	ARAS: ACC, FCW, BSD, intelligent induction start- up system, etc.	LONCIN	Jiyu OS	May 2023	 Intelligent riding protection: a full-dimension intelligent assistance and protection system wit intelligent vehicle check, driving situation perception and danger warning and instantaneous response:
Yamaha	Adaptive Cruise Control & Radar- linked Unified Brake System	Nov. 2022	 Adaptive Cruise Control & Radar-linked Unified Brake System: ACC, turning assistance, overtaking assistance, and automatic adjustment of electronic suspension. 				 Intelligent riding fun: smart wearable device connection with riding scenarios; Intelligent riding connection: Ernie Bot / intelligent interaction engine, chat ar interaction, riding assistance, intelligen asswers: remote IVI control front and rei
	Y-Connect	2023	 Y-Connect: navigation projection 				riding recorders, riding behavior analysis, etc.
СЕМОТО	"C-LINK"	Sept. 2022	 Intelligent connectivity: OTA, digital key, intelligent anti-theft, APP. Intelligent hardware: intelligent interaction center, multimodal interaction, customized navigation, mobile phone interconnection, anti-fall airbag riding clothes (to be available later), intelligent VR helmets, etc. Intelligent riding assistance : BSD, ACC, etc. 			Source:	ResearchInChina

Intelligence of Some Motorcycle Manufacturers



3. Automotive Tier 1 suppliers have dabbled in the two-wheeler industry.

Bosch has started developing ABS for motorcycles since 1984. Up to now, its products have covered motorcycles and electric two-wheelers. Bosch's two-wheeler products include:

Sensors (radar, IMU, wheel speed sensor, etc.) Motorcycle stability control (MSC) Anti-lock braking system (ABS) Advanced rider assist system (ARAS) Integrated interconnection (cluster is connected with helmet, mobile phone, etc.) B2V (information interaction between motorcycle and automobile) mySPIN APP Electric vehicle products (hub motor and drive control unit)

In addition to Bosch, Huawei, Qualcomm, Cerence and ABUP among others that are successful in vehicle intelligence also have set foot in the two-wheeler industry in recent years.

Huawei: In 2021, SUNRA became a partner of Huawei HarmonyOS, and officially launched the industry's first electric vehicle connected with HarmonyOS. In 2022, Huawei continued to use HarmonyOS as a stepping stone to expand its main business to the field of electric bicycles. In 2023, TAILG and Aima launched products equipped with HarmonyOS.



Summary of Electric Vehicle Brands Equipped with Huawei HarmonyOS

Brand	First model supported	Model price	Functions		
SUNR A	MIKU Super	RMB9,999- 14,999	Users can perform one-key operations on Huawei Smart APP, including unlocking, locking and automatic vehicle locking, as well as querying the remaining range and electricity. Users can also share the electric vehicle with their family and friends via their Huawei account.		
TAILG	TAILG Red Rabbit HarmonyOS Version	RMB3,899- 4,588	Control via APP, NFC unlocking, range prediction, intelligent fortification, intelligent vehicle inspection, etc.		
Aima	Aima Qingtian Mico	RMB4,399	Vehicles registered at and controlled by Smart Life App.		
Source: ResearchInChina					



Qualcomm: In May 2023, Qualcomm released a digital chassis supporting two-wheelers, providing connected services for two-wheelers. In September 2023. Qualcomm expanded its Snapdragon Digital Chassis portfolio with the introduction of two new platforms, QWM2290 and QWS2290, using the latest technologies of Snapdragon Cockpit Platform, Snapdragon Automotive Connected Platform, and Snapdragon Cloud Connected Digital Services to provide technical support for motorcycles, electric vehicles Currently, two-wheeler other fields. and manufacturers, Tier 1 suppliers, module vendors, etc. have adopted these two platforms to build related models. In November 2023, Valeo and Qualcomm cooperated on innovation for the 2wheeler and 3-wheeler segments in India. These collaborative efforts are an extension of the two companies' long-term working relationship to deliver advanced computing units for telematics and advanced driver assistance systems (ADAS) for software-defined vehicles (SDVs).





Cerence concentrates on building AI intelligent voice interactive assistants for the automotive industry

Cerence: Cerence concentrates on building Al intelligent voice interactive assistants for the automotive industry. In July 2021, it cooperated with Visteon to dabble in the two-wheeler field. From 2022 to 2023, it provided voice interactive products for motorcycle brands such as Qianjiang, CFMOTO and LONCIN.

At present, the intelligent driving of twowheelers features warning, and will have control functions (motorcycle self-balancing, lane keeping assist, emergency avoidance, etc.), so high-performance chips, cameras, radar and other hardware will be installed. Moreover, in the future, ever more twowheelers will have interconnection functions, such as intelligent interconnection, OTA, voice interaction, face recognition and gesture control.

Collaborator	Time	Content			
Visteon	Jul 2021	Visteon will integrate Cerence conversational AI into SmartCore™ two-wheeler product. The system will launch with a leading motorcycle manufacturer in 2024.			
Micware	Dec 2021	Cerence announced that it will partner with Micware to develop applications and voice- powered assistants for Japanese two-wheeler makers.			
Qianjiang	Feb 2022	Qianjiang Motorcycle selected the Cerence Ride two-wheeler platform to provide conversational AI and voice assistants with proactive service capabilities for its full line of models.			
CFMOTO Sep 2022 CFMot conver terrain contro		CFMotion selected Cerence to introduce conversational AI into its motorcycles and all-terrain vehicles for voice navigation and system control during driving.			
LONCIN	May 2023	LONCIN selected Cerence Ride to enable AI- powered voice interaction for riders of its high- end motorcycle line.			
	Source: ResearchInChina				

Collaborations of Cerence in Two-wheeler Business



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