

AutoTechInsight Webinar: Auto China 2026 Recap

May 14th, 2026



Presenters



Moderator

Anna H. Buettner, Principal Analyst

Anna.Buettner@spglobal.com



Quan Zhang, Senior Analyst

Quan.Zhang@spglobal.com



Fanni Li, Principal Analyst

Fanni.Li@spglobal.com

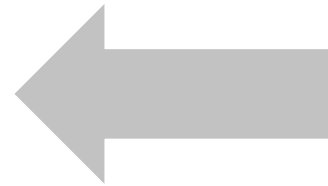


Daokuan Lu, Senior Analyst

Daokuan.Lu@spglobal.com

Questions and answers

To ask a question, please type your question in the “Ask a Question” box within the webcast system and click “Submit.”

A screenshot of a webcast interface window titled "Ask a Question". The window has a title bar with a gear icon, a minus sign, and a close button. The main content area is a large, empty gray rectangle. Below this area is a text input field with the placeholder text "Enter your question" and a "Submit" button to its right.

Introduction

2026 Beijing Auto Show (Auto China 2026), held from April 24 to May 3, 2026, is one of the world's largest automotive exhibition, With the theme "Future of Intelligence," the event serves as a global showcase for the next phase of automotive transformation.

The show covered a total exhibition area of 380,000 square meters, spanning both the China International Exhibition Center(Shunyi Venue) and the Capital International Exhibition Center. Total attendance reached 1.28 million visitor visits.

Key models and highlights: The 2026 Beijing Auto Show put a full spotlight on the trends of electrification and intelligent technologies.

Total vehicles on display: 1,451

Debut (premiere) models: 181

Concept cars: 71



Source: Beijing Auto show 2026

Photo source: S&P Global Mobility.

New models highlights



Source: Dusan Petkovic / iStock via Getty Images

“In China, for China” strategy of the Volkswagen brand is taking on visible form



ID.ERA 9X



ID.ERA 9X Cockpit



ID.ERA 9X rear door panel



ID.AURA T6

Photo source: S&P Global Mobility.

AUDI

| Brand | Product | Description |
|-------|---------|---|
| AUDI | E7X | <ul style="list-style-type: none">• The fully electric E7X combines the comforts of a spacious interior with Audi's signature driving dynamics and the maximum traction of quattro all-wheel drive. It translates the distinctive, monolithic AUDI design – with its characteristic light graphics at the front and rear of a large SUV. The upright front with digital matrix LED headlights vertically arranged in the black wraparound loop makes a confident statement.• AI-powered AUDI Assistant, an empathetic travel companion. Different types of zero-gravity seats are offered in 5-seater and 4-seater versions for enhanced relaxation, while a 21.4-inch screen deploys from the roof to provide rear passengers with a personalized multimedia experience.• The fully electric drive of the E7X with a system output of 300 or 500 kW ensures superior driving performance. The large battery option with a gross capacity of 109 kWh enables a maximum range of more than 750 kilometers measured according to CLTC standard. With AUDI 360 Driving Assist System, the E7X supports a relaxed and confident assisted driving experience both in city traffic and on highways. |



AUDI E7X



AUDI Interior

Photo source: S&P Global Mobility.

Toyota officially launched the “TO YOU” brand philosophy

| Company | Product | Description |
|---------|-----------|--|
| Toyota | Portfolio | <p>At this year’s Beijing Auto Show, Toyota presented the “TO YOU” philosophy through different themed experiential zones in a scenario-driven:</p> <ul style="list-style-type: none"> • Across Mountains and Rivers: Geared toward users who love exploration and pushing boundaries, highlighting reliability and all-terrain capability to deliver a more confident exploration experience. • Urban Enjoyment: Focused on city commuting and family travel scenarios, emphasizing the combined value of comfort, convenience, and versatility. • Prestige Mobility: Targeting users who value quality and a calm, refined experience, showcasing elevated comfort and sophistication for a premium travel experience. • Driving Passion: Designed for driving enthusiasts, spotlighting performance and handling to deliver a purer and more engaging driving experience. |



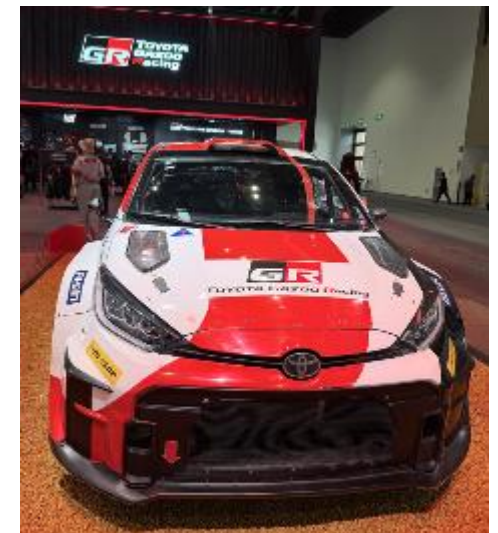
BZ3X



RAV 4



Crown Vellfire



GR Yaris Rally 2

Nissan demonstrates its accelerated NEV product offensive in China

| Company | Product | Description |
|---------|-------------------------------|--|
| Nissan | Nissan Urban SUV PHEV Concept | <ul style="list-style-type: none"> The Urban SUV PHEV Concept is designed for young Chinese customers. Its design draws from philosophies of the NX8 and Nissan's future SUV lineup, blending advanced electrification technology with urban daily driving performance. The Terrano PHEV Concept marks the return of an iconic nameplate. Equipped with the latest plug-in hybrid technology, the Terrano builds on Nissan's off-road heritage while addressing the dual needs of outdoor adventure and urban commuting. Production versions of both concept cars are scheduled to be unveiled within one year. Nissan also plans to introduce three additional NEV models in China within a year, further accelerating its NEV expansion and brand transformation. |
| | Nissan Terrano PHEV | |



Nissan Urban SUV PHEV Concept



Nissan NX8



Nissan Terrano PHEV

Photo source: S&P Global Mobility.

Hyundai Motor advances a renewed strategy "In China, For China, To Global"

| Company | Product | Description |
|---------------|---------|--|
| Hyundai Motor | IONIQ V | <ul style="list-style-type: none">• Spacious Interior: Class-leading cabin dimensions with 1,078 mm of first-row legroom and 1,019 mm of second-row legroom, complemented by best-in-class shoulder room (1,502 mm front / 1,473 mm rear) for superior comfort across both rows• Panoramic Display: 27-inch display with H-HUD for an intuitive driving interface• Immersive Sound: An audio system with eight speakers and support for Dolby Atmos as standard, unlocking new levels of emotion for users to enjoy their music, movies and more with unparalleled clarity and depth• Refined Ride Quality: Suspension optimized for comfort and stability across various road conditions• Low Noise Performance: Reduced road and wind noise for a quieter cabin environment |



IONIQ V



Interior

Photo source: S&P Global Mobility.

BMW



BMW 7



BMW i7



BMW iX3

Photo source: S&P Global Mobility.

Mercedes-Benz

| Brand | Product | Description |
|---------------|---------|--|
| Mercedes-Benz | GLC SUV | <ul style="list-style-type: none"> The electric SUV pays homage to Mercedes-Benz's classic design while incorporating cutting-edge technology, including an 800V high-voltage architecture. Tailored specifically for Chinese consumers' preference for spacious interiors, the GLC L EV measures 4,949mm in length, 1,970mm in width, and 1,710mm in height, with a wheelbase of 3,027mm. Compared to the overseas version, the wheelbase has been extended by 55mm, and the body lengthened by 104mm, improving rear legroom and passenger comfort. The cabin continues Mercedes-Benz's design language. A 39.1-inch MBUX super screen dominates the dashboard, comprising a 14.4-inch central display and a 12.3-inch front passenger screen. The system runs on the new MB.OS operating system powered by a Qualcomm Snapdragon 8295 chip. A new virtual assistant named "Xiao Ben" (meaning "Little Benz") supports OTA updates for continuous improvement. |



Mercedes-Benz GLC SUV



Mercedes-Benz GLC SUV

Photo source: S&P Global Mobility.

Lexus



New Lexus ES



New Lexus ES interior

Photo source: S&P Global Mobility.

BYD Technology showcases

BYD



BYD Great Tang



Seal 08



BYD Fast Charging



BYD TianShen Driving Assistance system models

Photo source: S&P Global Mobility.

Geely Technology showcases

| Brand | Product | Description |
|-------|-----------|---|
| Geely | Galaxy M9 | <ul style="list-style-type: none">• M9 is a six-seat flagship SUV with a distributed three-motor AWD set-up, and up to 520kW of system power. It is built on the GEA Evo native architecture, which unifies hardware, systems, ecosystem, and AI, while also using dual-chamber air suspension, CCD dampers, and adaptive modes such as Magic Carpet for comfort across different road conditions. M9 uses a native hybrid flat-floor layout with 88.3 per cent cabin space utilization and a six-seat configuration designed to maximize third-row comfort, which Geely NEV explicitly positions for larger families, executive transport, and chauffeur-driven use cases.• M9 is equipped with G-Pilot H5 intelligent driving and chassis intelligence set-up built on GEEA 3.0 Architecture and an AI Digital Chassis with millisecond-level response and precision torque control. |



Geely Galaxy M9



Geely Galaxy M9

Photo source: S&P Global Mobility.

Zeekr Technology showcases

| Brand | Product | Description |
|-------|---------|--|
| Zeekr | 8X | <ul style="list-style-type: none">• The Zeekr 8X Ultra Plus is built on the SEA-S (Haohan-S) super hybrid platform. It combines a 2.0T engine rated at 205 kW with a dual-motor electric drive system producing a combined 660 kW (885 hp).• The vehicle is equipped with a 70 kWh battery operating on a 900 V architecture. The system supports 6C charging, enabling a 20-80% charge in approximately 9 minutes under optimal conditions. The electric range reaches up to 410 km (CLTC), with total combined range figures depending on operating conditions.• The cabin features a dual-screen layout with a central infotainment display and a passenger-side display. |



Zeekr 8X



Zeekr 8X interior

Photo source: S&P Global Mobility.

Aistaland Technology showcases

Aistaland


| Brand | Product | Description |
|-----------|---|---|
| Aistaland | <p>Aistaland GT7</p>  A photograph of the Aistaland GT7, a sleek, futuristic electric sports car. The car is shown from a front-three-quarter view, highlighting its aerodynamic design, large headlights, and distinctive front grille. The license plate area displays 'GT7'. The car is parked on a light-colored surface, possibly at an exhibition or showroom. | <ul style="list-style-type: none">• The vehicle is equipped with a tri-motor system and a customized next-generation Qilin Battery from CATL, supporting an 800-volt 6C charging rate.• 896-line LiDAR system paired with an integrated dual-focus vision system capable of handling both wide-angle and long-range perception tasks. Beyond advanced perception technology, the GT7 features Huawei's Qiankun ADS 5 autonomous driving system, GT7 has obtained Guangzhou's L3 autonomous driving road test permit.• GT7 also debuts the new-generation Harmony Space cockpit, the upgraded Xiaoyi AI Agent acts as a conversational AI travel companion, delivering human-like interaction through three core capabilities: answers when you ask, understands what you mean, and completes closed-loop execution when you give a command.• Huawei XMC Qiankun Digital Chassis Engine pioneers six-domain integration, coordinating the powertrain, braking, steering, suspension, body control, and thermal management systems with millisecond-level response. With a triple-motor system, the Qijing GT7 accelerates from 0 to 100 km/h in just 2.98 seconds, supported by millisecond-level distributed torque control. |

Photo source: S&P Global Mobility.

Shangjie Technology showcases

| Brand | Product | Description |
|----------|------------|---|
| Shangjie | Z7 and Z7T | <ul style="list-style-type: none">The SAIC SHANGJIE Z7, a fashion-tech coupe, and the SAIC SHANGJIE Z7T shooting brake made a dazzling joint debut. Across the lineup, the two models come standard with five core Huawei technologies: Huawei Qiankun ADS 4.1 intelligent driving, 896-line dual-light-path image-grade LiDAR, Huawei Tuling Platform, Huawei Giant Whale 800V high-voltage battery platform and Huawei Harmony Space. Together with eight comfort-focused technology features, they deliver a smart and comfortable mobility experience that leads their class. |



Shangjie Z7T

Photo source: S&P Global Mobility.

Li Auto Technology showcases

| Brand | Product | Description |
|---------|----------|---|
| Li Auto | L9 Livis | <ul style="list-style-type: none">• Li Auto began pre-sales at 559,800 yuan (\$81,890). The car features Li Auto's in-house developed third-generation 1.5T range extender, which reduces fuel consumption to 6.3 liters per 100 kilometers. Li L9 Livis is equipped with a 72.7 kWh battery pack, offering a CLTC pure electric range of 420 kilometers and supporting 5C supercharging. The Li L9 Livis features an 800-volt fully active suspension system.• Li L9 Livis is equipped with two in-house developed 5nm M100 smart driving chips, delivering 2,560 TOPS of computing power. This computing power, paired with four LiDAR sensors, enables the L9 Livis to make precise decisions under complex road conditions, according to the company.• Li Auto's L9 Livis integrates steer-by-wire, four-wheel steering, and electromechanical brakes. The response speed of the electronically controlled brakes is significantly faster than that of hydraulic brakes, and it is positioned as a foundation for future advanced autonomous driving. |



Li Auto L9 Livis



Li Auto L9 Livis

Photo source: S&P Global Mobility.

NIO Technology showcases

| Brand | Product | Description |
|-------|---------|--|
| NIO | ES9 | <ul style="list-style-type: none">• NIO ES9, a new flagship executive SUV built on system-level innovation. ES9 is equipped with the world's first 5nm automotive - grade intelligent driving chip, Shenji NX9031. It is AI oriented full domain operating system SkyOS. It also supports 5C ultra fast charging and 3-minute battery swapping. The presale price of the NIO ES9 starts at 528,000 yuan. With the BaaS battery rental plan, it can be purchased for 420,000 yuan. ES9 has a vehicle length of 5,365 millimeters and a wheelbase of 3,250 millimeters.• At the show, visitors can explore its advanced systems, including NIO's SkyRide Full Active Suspension through immersive demonstrations. |



NIO ES9



NIO ES9



NIO ES9

Photo source: S&P Global Mobility.

Software-defined vehicle (SDV)



Source: Dusan Petkovic / iStock via Getty Images

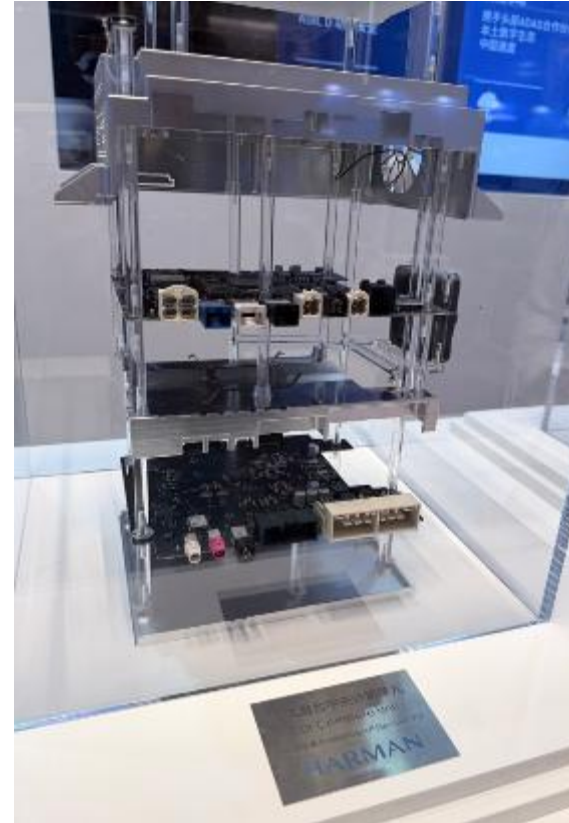
Multi domain fusion high compute solution

Marelli



Marelli CCU

Harman



Harman CCU

Cockpit + Telematics + ADAS + Gateway
Based on Qualcomm 8397

Source: S&P Global Mobility.

Multi domain fusion high compute solution

Zhuoyu



Zhuoyu and Autolink central compute

Cockpit ADAS fusion solution based on Qualcomm 8797

Photo source: S&P Global Mobility.

Leap Motor D19



Leap motor D19, MSRP \$35K – \$39K

Upper trim CCU use dual Qualcomm 8797

AI OS: full time active, AI call summary, parking space recognition, elevated road route switch, extreme weather active care

Other AI capabilities: personalized music, travel planning, coffee order, AI ambient lighting, encyclopedia, vehicle manual, emotional companion and AI news

Multi domain fusion high compute solution

Horizon Robotics

HSAE



Horizon Robotics Starry 6

Spec: 650 TOPS, 5nm, 273GB/s bandwidth

KaKaClaw solution: soul, skills and memory
Cloud and edge solution, sentry mode
Will launch in iCar V27



HSAE Cockpit ADAS fusion

Launched in Nissan EV models in China, based on Qualcomm 8775

Future platform: multi chips in one board for cost saving

Photo source: S&P Global Mobility.

AI box

Lenovo AI BOX



Lenovo AI box

Nvidia Orin for 7-8 B model

Thor Z platform 360 TOPS @ FP8, support up to 32B LLM/VLM

Weather detection, driving reminder, sentry mode, left things reminder, welcome personalized services, baby caring, Lenovo AI devices connection (Qira Agent)

Photo source: S&P Global Mobility.

Sense Time AI BOX and Robot



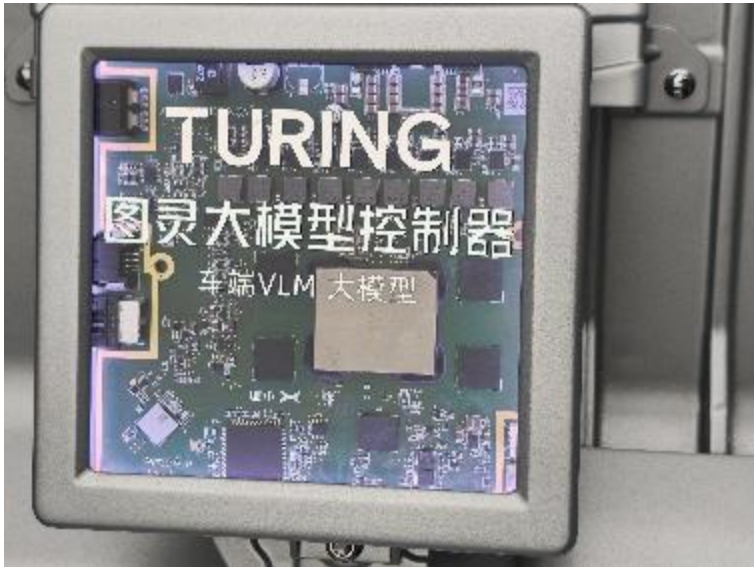
Sense Time AI box Sage

NVIDIA DRIVE AGX Orin X, AI agent, 32B model

Natural language conversation, fuzzy navigation, POI recommendation, support OpenClaw, connect with IoT devices, Feishu app for in car meetings, biometrics authentication for personal ID, robot can be customized.

AI box

Xpeng AI BOX (Turing VLM Controller)



Xpeng AI BOX use inhouse Turing AI chip (750 TOPS)

- Xpeng G7 (2026): Qualcomm 8295 + standalone Turing VLM controller (Optional to consumer)
- Always-on intelligence, proactive services and full-scenario natural voice interaction

Photo source: S&P Global Mobility.

Adayo AI BOX



Adayo AI box use Intel Ultra 225H

- CPU: 536 KDMIPS, NPU 82 TOPS
- Supports audio/video decoding, Ethernet and USB
- DDR bandwidth: 134GB/s, max DDR capacity 96GB

Optimistic of AI box growth

AI box

Aptiv AI BOX



Aptiv Intelligent Cockpit demo

Multimodal interaction, cabin sensing (Face ID, DMS, OMS) for rear seat reminder, scene understanding, connect with external speakers

Cloud + on-device hybrid (cloud for heavy reasoning/rendering, edge for low-latency and privacy-sensitive tasks).

Photo source: S&P Global Mobility.



Aptiv Intelligent Cockpit System
Cockpit domain controller + AI box

AI agent

Agent with location-based commerce



AI agent for food order
Qwen Omni 4B model for agentic services

Volcano engine integration of Doubao



Doubao AI agent launched in Chery Exeed
Different agent personality with emotional TTS, dialogue

Photo source: S&P Global Mobility.



Autolink use Modelbest MiniCPM

Agent OS and AquaClaw for user journey

Evolution of personalized cabin and real-time perception of environment

User Journey

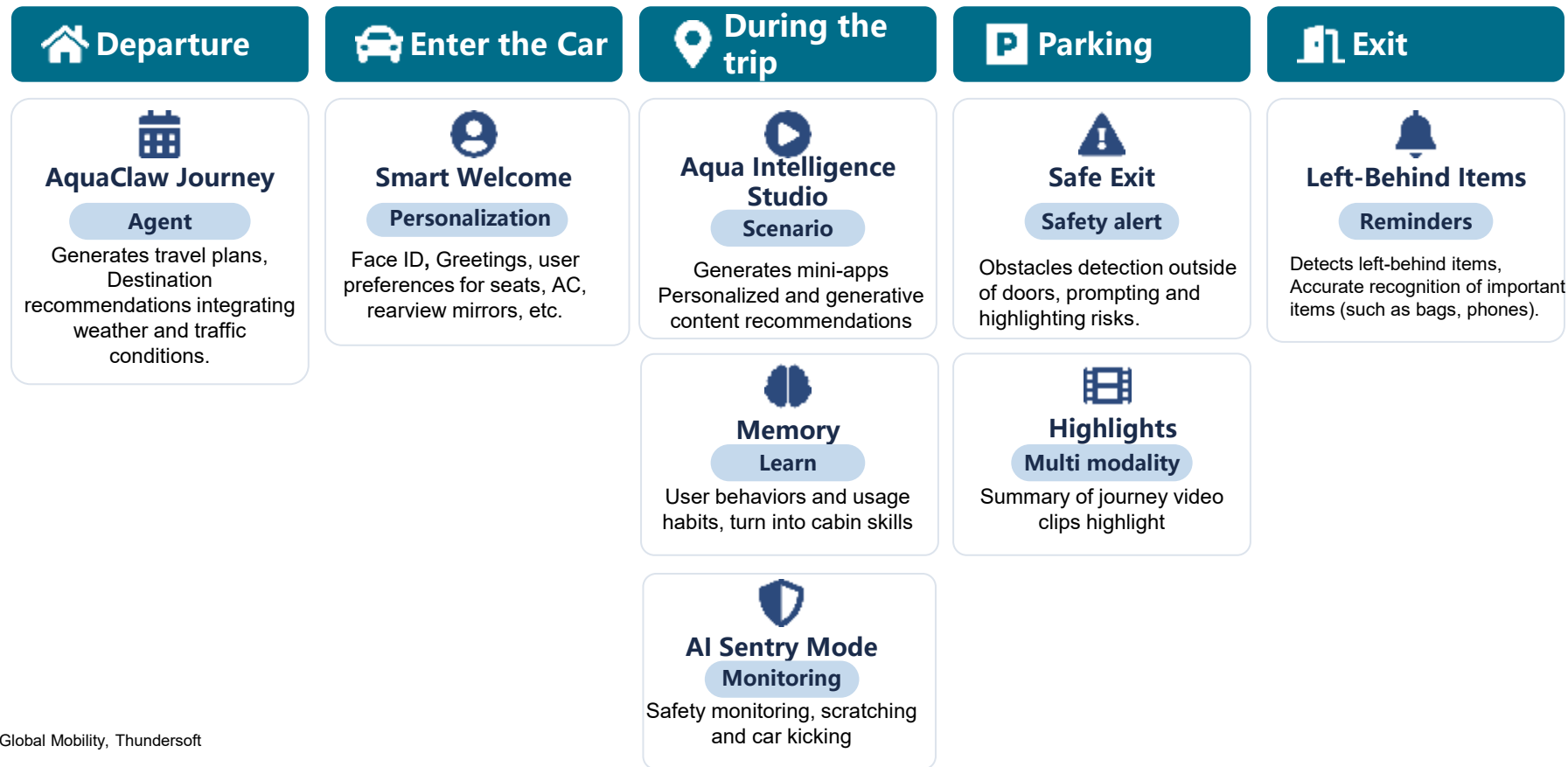
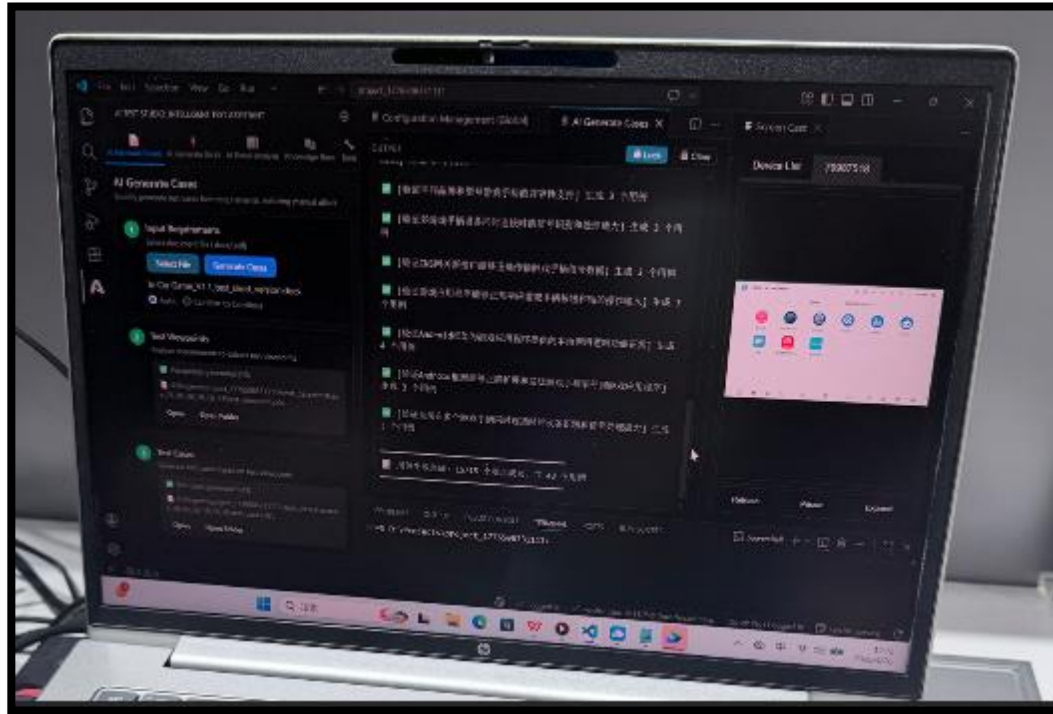
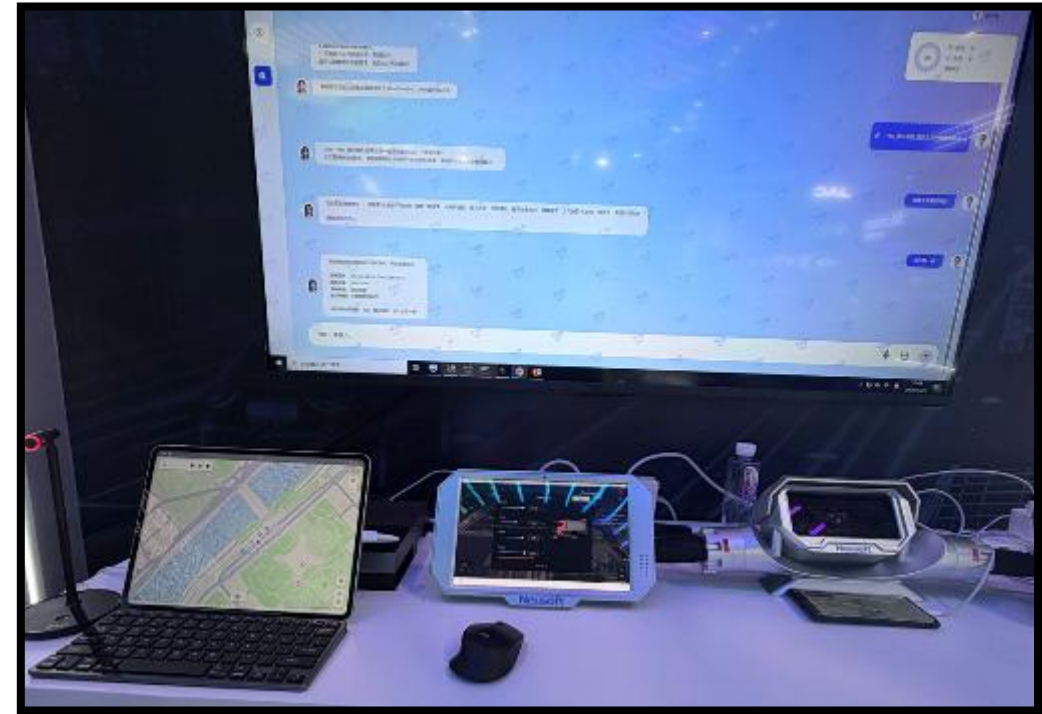


Photo source: S&P Global Mobility, Thundersoft

Other AI use cases in suppliers' business



Thundersoft AI Test Studio



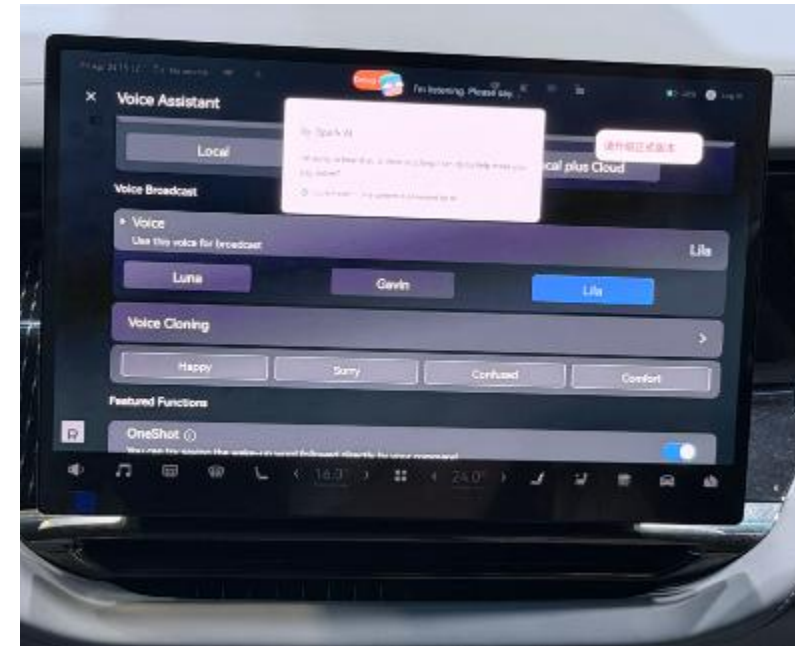
Neusoft AI Testing solution

Global solution and partnership

Navigation



HERE, TomTom, Navinfo, Neusoft and Telenav all showcased latest global navigation and map solution and announce partnership



iFlytek voice assistant
Multiple countries languages support, 32 languages in plan

Photo source: S&P Global Mobility.

Global market apps ecosystem



Harman Market Place



Valeo Racer

Photo source: S&P Global Mobility.

Affordable 5G Telematics



Marelli 5G RedCap Connectivity



Favalon AN762S module

Source: S&P Global Mobility.

In car sound experience

Arkamys



Studio speech clarity, Podcast mode
Cinema surround sound
Impressive sound experience with 6 speakers



Premium Audio Experience: partnership with branded audio

Authentic/Dynamic mode

Photo source: S&P Global Mobility.

UIUX highlights Displays, HUD, Acoustics



Source: Dusan Petkovic / iStock via Getty Images

Displays

- With the rise of large SUVs and MPVs, **over 60 of 181 new vehicles are D/E SUV and MPV models**, leading to more and larger displays, especially for rear-seat passengers.
- While display setups are varied, major brands use unified designs like combined Center Stack and Front Passenger Displays under one glass.
- Rear Seat Entertainment is becoming more common in large SUVs and MPVs, including display screens and even projectors.
- Display manufacturers are shifting from panel suppliers to providers of fully integrated systems.
- OLED growth has slowed in China, Mini-LED is becoming more popular, but Micro-LED is still in prototype Phase.
- New technologies like switchable glass and smart surfaces are emerging, often integrated with interior design.

Chery Fulwin T11 and Aito M9



Chery Fulwin T11 30" Center Stack Display+ Front Passenger display and 17.3" rear seat entertainment



Aito M9 Multi-Display Modules



Aito M9 rear seat 32" projector

Display Technology

Tianma



Tianma 17.9" Mini LED



Tianma 29.5" 6K display



Tianma 17" SPD AM-OLED

Photo source: S&P Global Mobility.



Tianma 12" Micro-LED HUD



Tianma Cadmium-free QD Display

Display Technology

| Company | Product/demo | Description |
|---------|-------------------------------|--|
| Tianma | 17.9" Mini LED | <ul style="list-style-type: none"> • Display technology: LTPS; Resolution (pixel): 3344x1440; Touch technology: TED (Touch Embedded Display); Multi-touch: 5 Points; Display+ Application: Ambiance Light Sensor; Dimming zones : 815; Color Depth APIX3 H-MTD; Application: Automotive. |
| | 29.5" 6K display | <ul style="list-style-type: none"> • Display technology: LTPS; Resolution (pixel): 6080×1680 Panel border(R/L/U/D) mm: 2/2/2/7.4; Color gamut (DCI-P3): 99%; • Interface Mode: eDP, Application: Automotive |
| | 17" SPD AM-OLED | <ul style="list-style-type: none"> • Display technology: AM-OLED ; Resolution (pixel): 2880×1620; PPI : 195; • TFT Backplane: SPD Switchable Privacy Display • Brightness (nit): 800; Color Gamut(NTSC): 105%; • Privacy Mode : L45°,R45°< 1%; Privacy Mode : L45°,R45°> 40%; • Response Time(ms): ≤1 |
| | 12" Micro-LED HUD | <ul style="list-style-type: none"> • Display Technology: Micro-LED; • Brightness(nits)(peak): >120,000, the display remains clearly visible even in direct sunlight |
| | 15.6" Cadmium-free QD Display | <ul style="list-style-type: none"> • Display Technology: LTPS; Resolution (pixel): 2560×1440; Dimming Zone Number: 1196 ; • Color gamut (NTSC): 110%; Color gamut (DCI-P3) > 99%; • Static Contrast ratio ≥ 100,000:1; Application: Automotive.1 |

Interior

Market Trend

| Product | Photo | Description |
|-------------------------|---|--|
| Switchable Glass |  | <p>Switchable glass technology shows a clear application expansion trend. Previously used mainly on panoramic roofs for heat insulation and privacy, at least five new models this year have adopted the technology on side windows, replacing traditional physical sunshades. Side window dimming offers one-click privacy protection and automatic transmittance adjustment to reduce glare, with higher usage frequency and more direct occupant perception. For example, the Zeekr 009, Xpeng GX applies smart dimming technology to its side windows, allowing rear passengers to switch to privacy mode with one touch. Unlike roof dimming, side window dimming is closer to passengers' sightlines and interaction zones. As costs decline and user experience improves, this segment is poised to become a significant growth area in the Chinese market.</p> |
| Trim Panel Screen-based |  | <p>Interior design reveals a clear trend toward “functional screen integration,” where traditional physical buttons are gradually being replaced by small embedded displays. This is especially evident in two areas: door panels with hidden touchscreens for window and seat controls, and seat armrests with integrated screens for seat adjustments and climate settings. The Volkswagen ID. Era 9 X features a disguised door panel display and second-row armrest touchscreens, significantly reducing physical buttons while enhancing the tech-forward cabin aesthetic. Geely V900 replaces traditional seat armrest buttons with a screen, providing more visual seat adjustment.</p> |

Source: Photos taken by Laura Dong/S&P Global

HUDs

- The HUD market is becoming increasingly competitive as more suppliers are entering as Tier 1 providers , such as Jingwei Hirain, BICV.
- Several firms offer key technologies but do not function as Tier 1 suppliers.
 - Huawei collaborates with six Tier 1 suppliers—Adayo Foryou, New Vision, Crystal Optech, Puchuang, Jiangcheng, and Finest (a Great Wall Company)—enabling OEMs to select a Tier 1 supplier for system integration.
 - ReaVis offers “PVB-free” technology that can eliminate the need for PVB film in windshield systems.
- New technologies are advancing, including Slope image HUD, AR-HUD + Parallel HUD (Windshield Display).

Technology showcases

HUD suppliers



BICV 3D AR-HUD

Photo source: S&P Global Mobility.



Jingwei Hirain AR-HUD

Technology showcases

| Company | Announcements | Description |
|------------|---------------------|---|
| New Vision | Slope+ Parallel HUD | <ul style="list-style-type: none"> • One of next-generation products under development. • Combines Slope image AR-HUD and Parallel Windshield Display (P-HUD). <p>Slope</p> <ul style="list-style-type: none"> • FOV 13° × 4.0°, VID 6.5-11m at mid Eye Box, VID 7.7m at Center of Mid Eye Box. • Brightness ≥ 12,000 nits • Eye Box 130 × 50+50/-50 mm • Local Dimming Sections 65 <p>Parallel</p> <ul style="list-style-type: none"> • FOV 14.7° × 2.0° , VID 1.0 m • Brightness ≥ 3,200 nits • Local Dimming Sections 301 • Eye Box 130 × 130+ 30/-30 mm |
| | HUD 2.0 Deep Scenes | <ul style="list-style-type: none"> • Features dual-focal-plane design and local dimming technology. • Deliveries enhances sense by integrating instrument displays at near distance and AR fusion at far distanced • Far Distance, FOV 12° × 4°, VID 7.5m, PGU(Picture Generation Unit) 4.1” TFT • Near Distance, FOV 8° × 3°, VID 4m, PGU(Picture Generation Unit) 3.1” TFT • Brightness ≥ 12000 nits. • Contrast 10,000:1. • Local Dimming Sections 128 96. |

Technology showcases

New Vision



New Vision Slope+ Parallel HUD



New Vision HUD 2.0 Deep Scenes

Photo source: S&P Global Mobility.

Acoustics

- There are varying levels of competition, hardware specifications, sound quality, and brand image.
- Having 15 or more speakers has become standard, with some of the latest vehicles offering over 40 speakers and maximum power output of 3-4 kW.
- Previously, audio brands like Lexicon and Naim were limited to Premium and Luxury vehicles ,but they were introduced by Jetour and Zeekr at more accessible price points, with vehicle MSRPs starting around \$55,000.
- Several automakers and suppliers have developed white-label solutions marketed under their own brand names, such as Xpeng's Xopera.
- Acoustic components, particularly amplifiers, have advanced alongside E&E architectures, including innovations like distributed amplifiers, 48V amplifier systems and DSP integrated in Center Computer SOC.

Technology showcases

Acoustics



Nio LYRA Sound System | 9.2.4.8



iFLYSOUND Pro amplifier platform



Lexicon branded audio in Chery Jetour G700

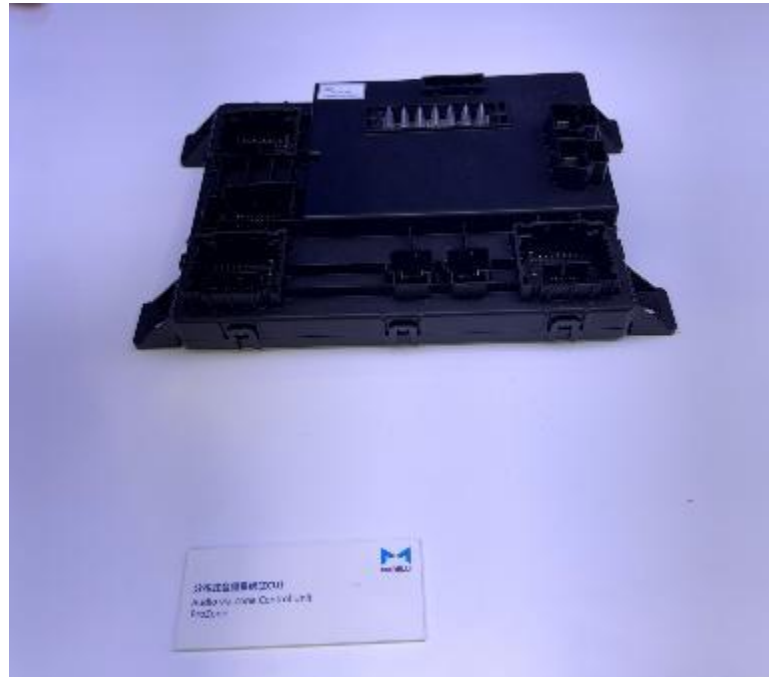
Photo source: S&P Global Mobility.

Technology showcases

Acoustics



Xopera logo, Xpeng GX door speaker



Marelli Audio via Zone Control Unit ProZone



Harman CCU

Cockpit + Telematics + ADAS + Gateway
Based on Qualcomm 8x97, DSP integrated in SOC

Photo source: S&P Global Mobility.

Autonomy



Source: Dusan Petkovic / iStock via Getty Images

2026 as a Pivotal Year for the Scaled Commercialization of L3 Autonomous Driving in China

Huawei Has Emerged as the Primary Driver of L3 Autonomous Driving Adoption in China's Private Passenger Vehicle Market. L3 Is Becoming a Necessary Technological Transition from L2+ to L4.



Stelato S9

On the eve of the Auto Show, Huawei unveiled its ADS 5.0 system, paired with an upgraded high-performance 896-line LiDAR, significantly extending perception range. At the same time, Huawei enhanced its full-spectrum collision avoidance system to CAS 5.0, further improving overall system safety and laying the groundwork for the commercial deployment of L3 autonomous driving. Backed by a broad ecosystem of Huawei partners, the company is expected to emerge as the leading L3 technology provider in the Chinese market.



Audi E7X

As another major autonomous driving solution provider in China, Momenta also announced during the Auto Show that it will launch L3-level autonomous driving on the SAIC Audi E7X. This move underscores how German premium brands are increasingly positioning the Chinese market as a testing ground and frontier for advanced autonomous driving technologies deployment.

2026 as a Pivotal Year for the Scaled Commercialization of L3 Autonomous Driving in China

- Considering current deployment realities and compliance boundaries, L3 will likely remain an important form over the next 2–3 years: consumers need time to learn and adapt, and regulators also need L3 as a transition to accumulate governance/enforcement experience and gradually optimize the legal and regulatory system for autonomous driving.
- The cadence may be “standards first, legislation later”: MIIT can more decisively and quickly push national standards, while Road Traffic Safety Law revision needs a longer cycle of argumentation, coordination, and legislative procedures—explaining why technical regulatory tools are being rolled out intensively in the short term.
- L3 is more likely a necessary “transitional solution” rather than an end state: constrained by L3’s experience and functional boundaries, our view is that after 2030 the main technical direction will still be L4.

Convergence in Core Autonomous Driving Technologies

Single-stage EndToEnd + World model + Reinforcement learning

ADS 5.0 WEWA 2.0 architecture from **Huawei**, R7 model from **Momenta**, Qpilot Max from **Qcraft**, HSD v1.6 from **Horizon Robotics**, WRD 3.0 from **WeRide AI**, multimodal model from **ZYT**, VAL2.0 from **Xpeng**, NWM from **NIO**...

At this year's Auto Show, competition in China's autonomous driving industry has moved away from hardware stacking—such as emphasizing the number of LiDARs or cameras. In practice, sensor configurations (for example, 11-V layouts) have already become largely standardized. Industry attention is now broadly shifting toward the core value of autonomous driving: software algorithms. End-to-end autonomous driving technology is evolving from modular or multi-stage end-to-end architectures toward single-stage end-to-end approaches. In parallel with the rapid advancement of large AI foundation models, world model architectures have been widely adopted by most Tier-1 suppliers and OEMs. The deeper driver behind this shift is the transition from advanced ADAS to autonomous driving, where system safety requirements rise significantly. Takeover rates—directly affecting user experience—must be further reduced. This, in turn, requires much stronger scenario generalization and fast system response capabilities. By enabling a structured understanding of the physical world, world models enhance system performance and help lay the groundwork for higher levels of autonomous driving.

What's next? Maybe Physical foundation model.

The development trajectory of large-scale models in automotive autonomous driving is increasingly pointing toward a deeper understanding of the underlying operating logic of the physical world. For example, Huawei's WEWA 2.0 architecture is evolving into an autonomous-driving AI agent, capable of performing online reinforcement learning, following a loop of “generate, learn, and validate simultaneously.” Similarly, ZYT emphasizes that its foundation model learns the fundamental rules governing how the world operates, significantly enhancing scenario generalization. DeepRoute.ai believes that, in the future, physical-world AI foundation models will become the core gateway for AI systems to enter and operate in the real world. By advancing foundation models, companies can substantially improve model efficiency, reduce the adaptation workload across different vehicle platforms and applications, and even extend these capabilities to adjacent domains such as autonomous logistics and embodied AI.

Convergence in Core Autonomous Driving Technologies

Large model deployment is accelerating growth in vehicle-side compute performance

As world model technologies continue to move into real-world deployment, the parameter scale of in-vehicle multimodal autonomous-driving foundation models is increasing rapidly. Model sizes are expected to reach the 100-billion-parameter (100B) level within the next one to two years, posing new challenges for chip computing performance and data-throughput bandwidth. The product specifications of Tesla's AI5 chip are viewed as an important industry benchmark, suggesting that computing units delivering more than 2,000 TOPS will become a standard configuration for high-end intelligent driving systems.

From this perspective, the in-house development SoC remains a viable and sustainable business model. Commercial high-performance chips are expensive, while market demand continues to expand. Through tight hardware–software co-design and customization, in-house SoC can achieve better cost efficiency, and scale effects can further amortize development costs over time.

L4 Mobility: Advancing further towards commercialization

OEMs



Zeekr Eva Cab (concept)

- First purpose-built Robotaxi in China without driving seat and steering wheel
- G-ASD L4 system from Afari, first installation of 2160 layers digital lidar and 3000+TOPs SoC in total (Intel superchip + Thor U+ SA8797)



BAIC Arcfox Robotaxi



BAIC Robotaxi concept

BAIC

BAIC launched Arcfox alpha T5 Robotaxi in daily operation, L4 system was enabled by Pony AI. In this Beijing Auto show BAIC introduced KOSMOS intelligent platform covering L2+, L3 and L4. New BAIC robotaxi concept has no human driving system.

Comment: none-driving seat model passenger car is now not defined in Chinese regulation, future deployment of this kind of robotaxi need additional regulation approve.

L4 Mobility: Advancing further towards commercialization

Tier1



- **WeRide** mass production Robotaxi **GXR** built on Geely Farizon van is the first installation of Thor-X, the **HPC3.0** ADC with 2 Thor-X was designed and manufactured by **Lenovo**.
- **WRD3.0** is WeRide one stage End2End L2+ system which is technologically homologous from WeRide L4 system. First SOP of WRD3.0 will be on Aion N60(200TOPs). WeRide has successfully extended its advanced L4 technologies into the L2+ assisted driving market and achieved solid adoption, further enhancing the commercial value of its L4 technology stack.

WeRide GXR Robotaxi

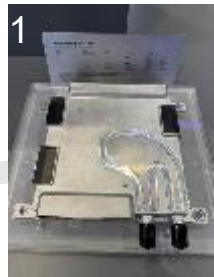


Pony AI bz4X Robotaxi

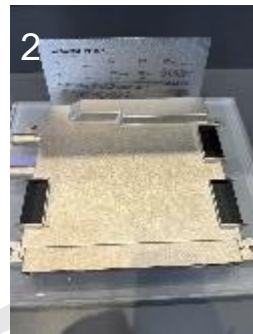
- **Pony AI** announced their new generation Robotaxi coming in 2027 will cost less than 230K RMB(including base car, battery, autonomy system, etc.), price will be comparable to a Tesla Model 3 in China.
- Pony.ai is leveraging technology and operational capabilities derived from its Robotaxi program to expand into urban delivery, targeting **L4 autonomous light-truck** applications.

New Advances in Integrated Cockpit-and-Driving Architectures

Cockpit-driving integration is no longer limited to low-cost solution, but is increasingly designed to balance both cost efficiency and high performance—particularly the integration required to support advanced L2+ urban driving functions.



First roll out of cockpit-driving integration was built on Qualcomm **SA8775** in 2025. This central computer can realize L2+ highway functions.



Based on more powerful Qualcomm **SA8797** SoC, the next-generation central computer operate real-time autonomy large models, enabling urban L2+ to L3 driving capabilities, while simultaneously powering the next generation of immersive intelligent cockpits.

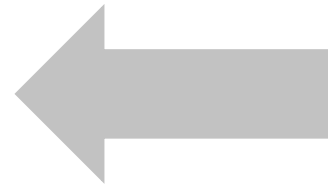


An integrated cockpit-and-driving solution built on Horizon Robotics' latest domestic cockpit-driving dedicated chip, **Starry 6P**, is able to deliver L2+ capabilities comparable to the HSD system based on the Journey 6P (J6P) chip. This integrated solution has already secured a business win from Chery iCar and is scheduled to SOP in Q3 of 2026.

1. ZYT x AutoLink SA8775 cockpit-driving central computer
2. ZYT SA8797P-A cockpit-driving central computer
3. ZYT SA8797P-D cockpit-driving central computer
4. Horizon Robotics Starry 6P cockpit-driving central computer reference platform

Questions and answers

To ask a question, please type your question in the “Ask a Question” box within the webcast system and click “Submit.”

A screenshot of a webcast interface window titled "Ask a Question". The window has a title bar with a gear icon, a minus sign, and a close button. The main content area is a large, empty gray rectangle. Below this rectangle is a text input field with the placeholder text "Enter your question" and a "Submit" button to its right.

thank you!

Next AutoTechInsight Webinar on May 27th, 2026

Next-gen BIW design - Lightweight technologies and requirements

Contact Us

Email AskMobility@spglobal.com

Telephone

America +1 800 447 2273
Asia Pacific +604 291 3600
EMEA +44 (0) 134 432 8300
Japan +81 3 6262 1887

Corporate Site

Chinese spglobal.com/China_Automotive
English spglobal.com/Mobility
Japanese spglobal.com/Japan_Automotive
Korean spglobal.com/Korea_Automotive

Calendar

spglobal.com/AutoCalendar

Content

spglobal.com/TheMobilityPaper

Conversation

spglobal.com/ConversationalSurvey

Customer Bulletin

Connect

Mobility LinkedIn Group



Mobility YouTube



S&P Global Mobility WeChat (Public)



S&P Global Mobility WeChat (VIP)



Copyright © 2026 S&P Global Inc. All rights reserved.

These materials, including any software, data, processing technology, index data, ratings, credit-related analysis, research, model, software or other application or output described herein, or any part thereof (collectively the “Property”) constitute the proprietary and confidential information of S&P Global Inc its affiliates (each and together “S&P Global”) and/or its third party provider licensors. S&P Global on behalf of itself and its third-party licensors reserves all rights in and to the Property. These materials have been prepared solely for information purposes based upon information generally available to the public and from sources believed to be reliable.

Any copying, reproduction, reverse-engineering, modification, distribution, transmission or disclosure of the Property, in any form or by any means, is strictly prohibited without the prior written consent of S&P Global. The Property shall not be used for any unauthorized or unlawful purposes. S&P Global’s opinions, statements, estimates, projections, quotes and credit-related and other analyses are statements of opinion as of the date they are expressed and not statements of fact or recommendations to purchase, hold, or sell any securities or to make any investment decisions, and do not address the suitability of any security, and there is no obligation on S&P Global to update the foregoing or any other element of the Property. S&P Global may provide index data. Direct investment in an index is not possible. Exposure to an asset class represented by an index is available through investable instruments based on that index. The Property and its composition and content are subject to change without notice.

THE PROPERTY IS PROVIDED ON AN “AS IS” BASIS. NEITHER S&P GLOBAL NOR ANY THIRD PARTY PROVIDERS (TOGETHER, “S&P GLOBAL PARTIES”) MAKE ANY WARRANTY, EXPRESS OR IMPLIED, INCLUDING BUT NOT LIMITED TO ANY WARRANTIES OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE, FREEDOM FROM BUGS, SOFTWARE ERRORS OR DEFECTS, THAT THE PROPERTY’S FUNCTIONING WILL BE UNINTERRUPTED OR THAT THE PROPERTY WILL OPERATE IN ANY SOFTWARE OR HARDWARE CONFIGURATION, NOR ANY WARRANTIES, EXPRESS OR IMPLIED, AS TO ITS ACCURACY, AVAILABILITY, COMPLETENESS OR TIMELINESS, OR TO THE RESULTS TO BE OBTAINED FROM THE USE OF THE PROPERTY. S&P GLOBAL PARTIES SHALL NOT IN ANY WAY BE LIABLE TO ANY RECIPIENT FOR ANY INACCURACIES, ERRORS OR OMISSIONS REGARDLESS OF THE CAUSE. Without limiting the foregoing, S&P Global Parties shall have no liability whatsoever to any recipient, whether in contract, in tort (including negligence), under warranty, under statute or otherwise, in respect of any loss or damage suffered by any recipient as a result of or in connection with the Property, or any course of action determined, by it or any third party, whether or not based on or relating to the Property. In no event shall S&P Global be liable to any party for any direct, indirect, incidental, exemplary, compensatory, punitive, special or consequential damages, costs, expenses, legal fees or losses (including without limitation lost income or lost profits and opportunity costs or losses caused by negligence) in connection with any use of the Property even if advised of the possibility of such damages. The Property should not be relied on and is not a substitute for the skill, judgment and experience of the user, its management, employees, advisors and/or clients when making investment and other business decisions.

The S&P Global logo is a registered trademark of S&P Global, and the trademarks of S&P Global used within this document or materials are protected by international laws. Any other names may be trademarks of their respective owners.

The inclusion of a link to an external website by S&P Global should not be understood to be an endorsement of that website or the website's owners (or their products/services). S&P Global is not responsible for either the content or output of external websites. S&P Global keeps certain activities of its divisions separate from each other in order to preserve the independence and objectivity of their respective activities. As a result, certain divisions of S&P Global may have information that is not available to other S&P Global divisions. S&P Global has established policies and procedures to maintain the confidentiality of certain nonpublic information received in connection with each analytical process. S&P Global may receive compensation for its ratings and certain analyses, normally from issuers or underwriters of securities or from obligors. S&P Global reserves the right to disseminate its opinions and analyses. S&P Global Ratings’ public ratings and analyses are made available on its sites, www.spglobal.com/ratings (free of charge) and www.capitaliq.com (subscription), and may be distributed through other means, including via S&P Global publications and third party redistributors.

This content was created with the assistance of Kensho Spark Assist, an artificial intelligence (AI) tool. For complete Terms of Use, see <https://www.spglobal.com/en/terms-of-use>.