



Connected & Mobility Services

#628

Monthly Head-Unit China Update

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RELATED SBD REPORTS



616 – Head-Unit Database

SBD's Head-Unit Database is a comprehensive data snapshot of in-vehicle input and output HMIs and associated features (e.g. map updateability methods, routing options, etc.), services (e.g. CarPlay, Android Auto, type of broadcast traffic, etc.) and technologies (e.g. HDD, Head-Up Display, etc.) in a specific region.

In several regions across the western world, a growing number of luxury and mass-market OEMs are delivering new vehicles and technologies year-on-year. However, alongside these launches, the Chinese automotive market continues to innovate and excel, seeing more facelifts and model launches than any other market around the world.

With China's market releasing more models and announcing new vehicle line-ups at increasingly rapid pace, the rate at which domestic and international OEMs are breaking new ground and evolving is increasing at a similar pace. This innovation from OEMs within the market can notably be observed in the HMI and connectivity features built into their vehicles - many of which are not yet seen in other markets.

The Monthly Head Unit China Update tracks the latest infotainment systems and connected features coming from the region. The most innovative vehicles launches and features are highlighted before the report takes a deep dive into the offerings of one of the vehicles released in the market. Here, expert analysis and insights are provided throughout as well as detailed comparisons between system generations. This report is updated monthly - with each new entry defining and analyzing the latest launches from domestic and international OEMs in the region.

COVERAGE



GLOBAL



NA



CHINA



EUROPE

FREQUENCY



Monthly



QUARTERLY



ONE-OFF

PUBLICATION FORMAT



PDF



POWERPOINT



EXCEL



ONLINE

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Key questions answered

- > What new or disruptive infotainment systems are launched in China each month?
- > How is the connected car hardware, software, and content ecosystem evolving?
- > What are the disruptive features entering the China market for the first time?
- > What is the timing and infotainment implications of new models entering the market?

This research supports



PRODUCT PLANNERS



UX



MARKETING



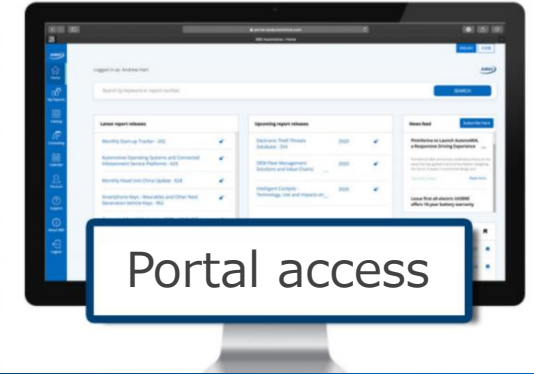
ENGINEERING

Do I have access?

100+
Reports published
per year

50k+
Slides of insights,
forecasts & data

4,000+
of auto professionals
who access our reports

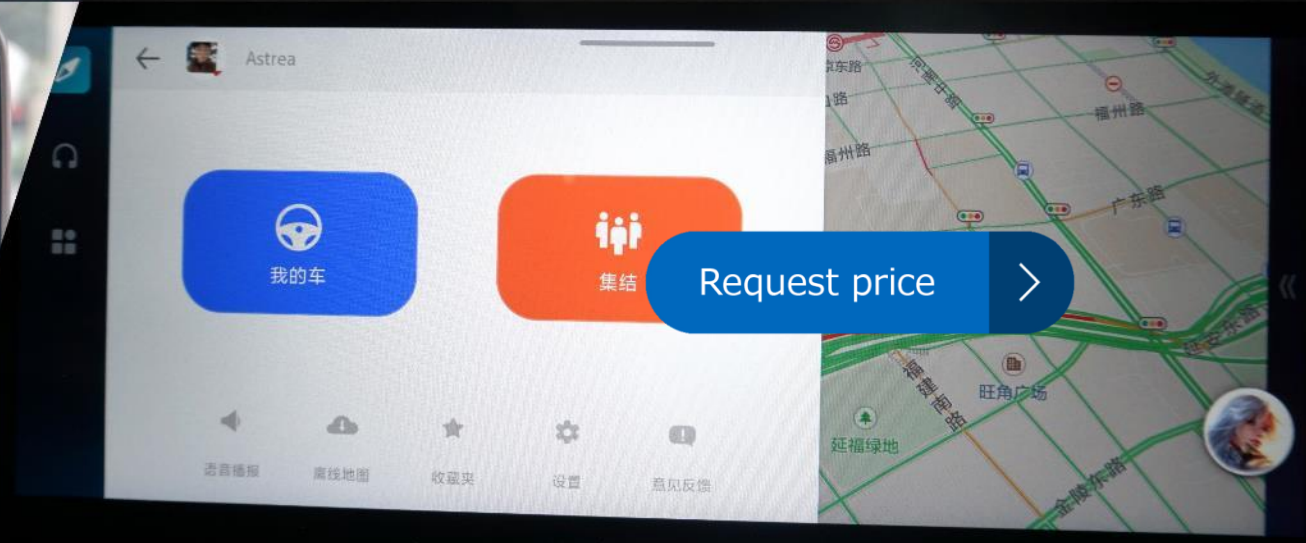


MONTHLY HEAD UNIT CHINA UPDATE

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Monthly Head-Unit China Update
Monthly Report for 2024


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MONTHLY HEAD UNIT CHINA UPDATE

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<u>What's New?</u> »	17	<u>Go Deeper</u> »	33
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Data Deep Dive
View and analyze deep data in your own way



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Introduction



Introduction

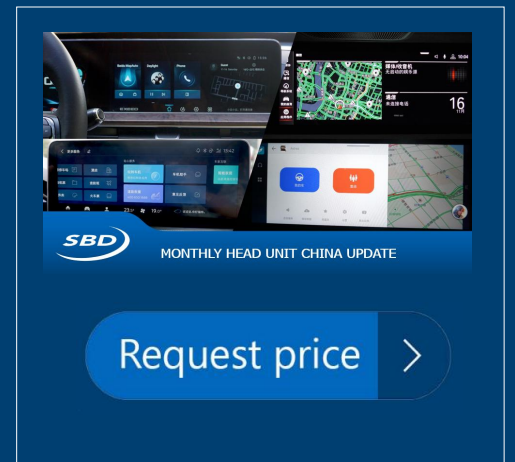
The China automotive market has more new vehicle models launched and facelifts per month than any other region. International and domestic OEMs are constantly breaking new ground with innovative connectivity and UX features – many of which are not yet seen in other markets. This report is updated monthly for the China region to account for the development of these systems and provide up-to-date information to aid decision-making.

This monthly tracker provides a summary of the infotainment highlights of those vehicle launches and highlights their most innovative features. This guide takes a deep dive into one of the most notable systems, summarizing the hardware, software, HMI, infotainment implications, etc.

Section	Content
The Basics	The vehicle list of new model launches in the current month includes OEM, model, release category, planned launch date, and the connected systems of the new models. The new models with new connected systems are highlighted and will be introduced in the following sections.
What's New?	Section focusing on one of the most notable systems, including the summary of innovative features entering the market and the major supplier information. The detailed implications of these features are also introduced.
New System Summary	Section focusing on the major information (e.g. price, HMI, service free period) of the new connected systems in the current month and the comparison of the service detail for new connected systems.
Go Deeper	Can SBD help you with any unanswered questions?



Example slides from the report





Vehicles in March (1/8)

No.	OEM	Model	New /Facelift	Planned launch date	Connected system	New system?
1	Honda	Civic	Facelift	01/03/2025	Honda Connect 4.0, CarLife, CarPlay	No
2	FAW-Volkswagen	TAYRON	Facelift	01/03/2025	CNS 3.0 (FAW-Volkswagen), CarLife, CarPlay	No
3	Chang'an	CS75 PLUS	Facelift	01/03/2025	Tianyu Space, HiCar, CarLink, T-Link	Yes
4	Cadillac	CT5	Facelift	01/03/2025	CUE, CarPlay, CarLife, OnStar	No
5	Tesla	Model Y	Facelift	01/03/2025	Tesla Infotainment System	No
6	Landian	E5 Plus	New	01/03/2025	Harmony OS 4.0, Hicar	No
7	Fangchengbao	Leopard 8	New	02/03/2025	FiLink	No
8	Buick	Regal	Facelift	03/03/2025	OnStar, eConnect 3.0, CarPlay, CarLife	No
9	Audi	RS 6	Facelift	03/03/2025	Audi Connect 5.0, CarPlay	No
10	Haval	H6	Facelift	03/03/2025	Haval Connect 3.0, HiCar	No

Last updated: March 24th, 2025



Interior HMI

In-vehicle camera 1

For OMS

AR-HUD

41.9-inch

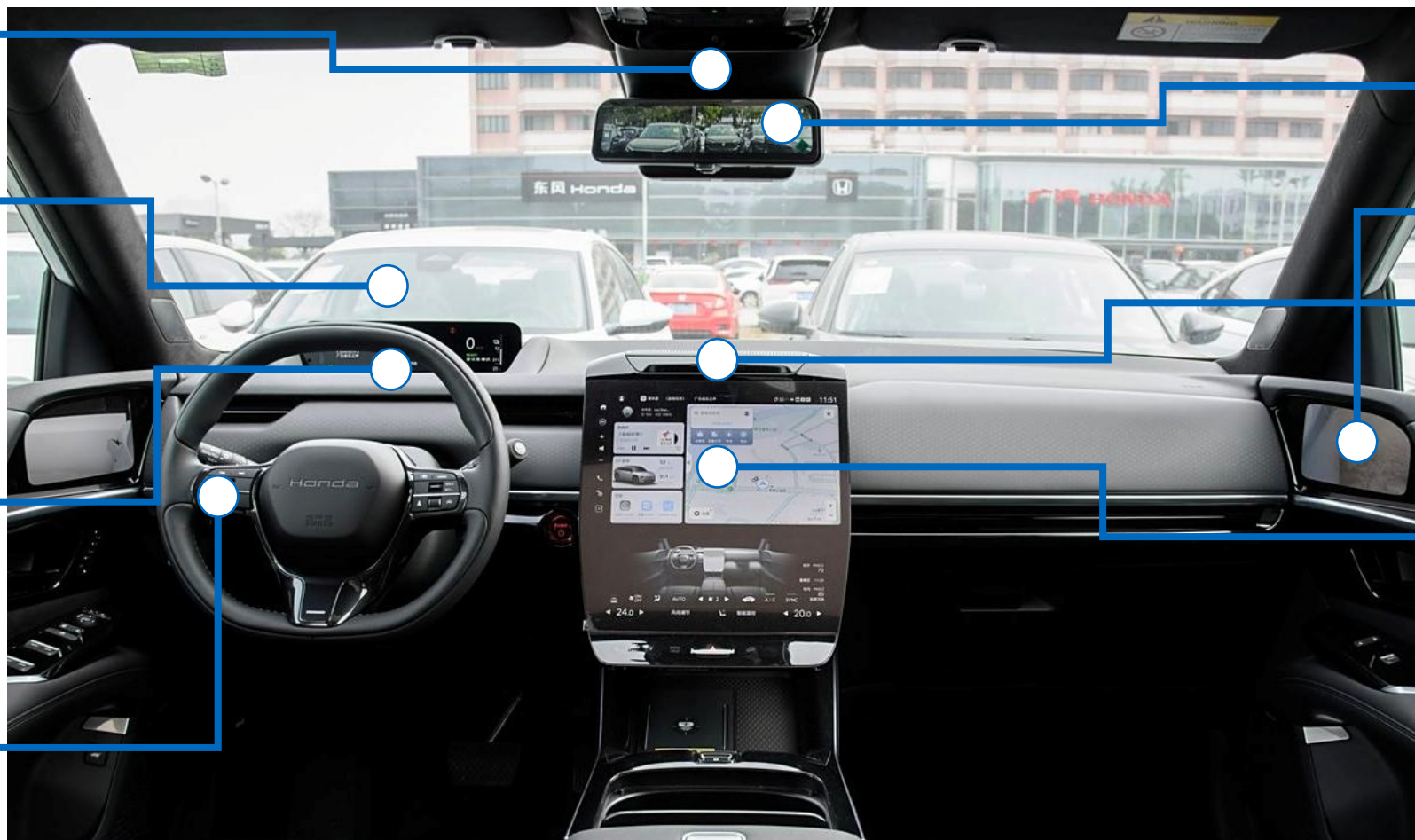


IC Display

9.9-inch

Steering wheel button

Steering wheel with multiple control buttons



CMS

In-vehicle camera 2

For DMS

Central display

12.8+10.25-inch touch screen



In-vehicle Camera & VPA

In-vehicle Camera

- Honda S7 offers 2 In-vehicle camera, one above the rear-view mirror and one above the central display.
- Camera function above the central display:
 - **DMS:** Monitoring of driver fatigue/distraction.
 - **Facial recognition: Login through face recognition,** the system automatically matches personal preferences, such as seat position, air-conditioning temperature, ambient lighting, etc.; **Payment by Face Recognition.**
- Camera function above the rear-view mirror:
 - **OMS:** Drivers can monitor passengers via camera.
 - **Take pictures:** The camera can be used to take photos of the interior of the car.
 - **Remote viewing of the car's interior via APP.**
- **SBD insight:** Honda S7's two in-car cameras carry a more comprehensive range of common in-car features, providing a more convenient and interesting experience for users. One of the highlights is the face recognition payment, which is unique in the current market.



Facial recognition



Cabin watch function

VPA

- Supplied by iFlytek, Honda S7's VPA has several voice skills and highlights:
 - Continuous dialogue
 - Dialect recognition
 - Four sound-zone recognition
 - Wake-up free
 - Intergation with 2 LLM: Supplied by **Doubao & AliCloud Tongyi**
 - Various avatar expressions
- **SBD insight:** The Honda S7'S VPA not only carries a variety of voice skills but also integrates with two kinds of LLM: Doubao and AliCloud Tongyi, which can bring users a more intelligent voice interaction experience.

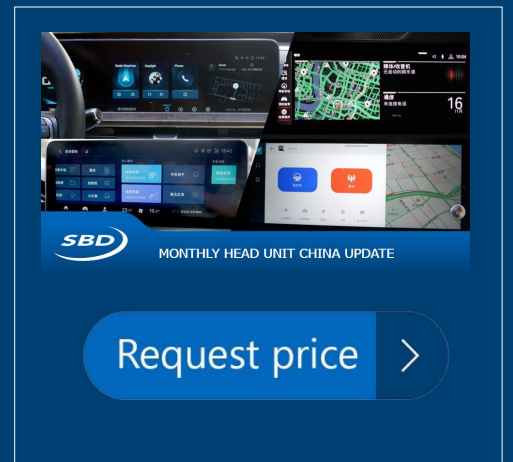


AI VPA's image emoji

(*Research time: Mar. 27th, 2025.)



What the Excel Version Contains





Excel Database Includes



SBD		Monthly Head Unit China Update								
628-25-03		  								
Basic vehicle information										
Report Edition	OEM	Model	Model Year	New/Facelift	Planned launch date	Segment	Powertrain type (ICE/ BEV/ PHEV/ FCEV)	Minimum Vehicle price (CNY) (Inclusive of Tax)	Maximum Vehicle price (CNY) (Inclusive of Tax)	Connected system
January	NIO	ET9	2025	New	12/26/2024	D	BEV	788,000	818,000	NT.Cedar
February	Dongfeng Forthing	Xinghai S7	2025	New	23/01/2025	C	BEV/REEV	109,900	189,900	Xinghai OS
March	Honda	S7	2025	New	26/03/2025	SUV	BEV	259,900	309,900	Honda Connect 4.0

Excel Data Points:
1,100+

Models Covered:
7

Vehicle Services Covered:
70+



Excel Database Includes



Monthly Head Unit China Update



Suppliers									HMI											CE Integration			
Hardware Integration	Processor	OS	Software Integration	Map	Navigation	3rd Party Contents	Voice Recognition	Network Connection	Center Screen	IC Display	Central Display Resolution	Floating Display	Integrated Central Display	Co-driver display	HUD	Central Display Shape	Central Display Orientation	ADAS Display	Handwriting	Gesture control	In car camera	Type (CP/CL)	S/P integration
To be announced	Qualcomm Snapdragon SA8295P	In-house	In-house	AutoNavi	AutoNavi	QQ Music, Ximalaya FM, iQiyi, Bilibili, Wesing KTV, etc.	In-house	5G	15.6-inch touch screen	To be announced	2880*1800	Y	N	N	Y	Rectangular	Landscape	All	Y	N	Y	N	N
To be announced	AutoChips AC8025	Android	To be announced	AutoNavi	AutoNavi	Kuwo Music, Ximalaya FM, iQiyi, Cheyu, etc.	iFlytek	4G	14.6/15.6-inch touch screen	8.8-inch display	1920*1080	Y	N	N	N	Rectangular	Landscape	All	Y	N	Y	N	N
To be announced	Qualcomm Snapdragon 8155	To be announced	Hynex	Baidu	Baidu	Kugou Music, Ximalaya FM, Aiquting, Changba, etc.	iFlytek	5G	12.8+10.25-inch touch screen	9.9-inch display	To be announced	Y	N	N	Y	Rectangular	Portrait	All	Y	Y	Y	Y	Y

Excel Data Points:
1,100+









Models Covered:
7

Vehicle Services Covered:
70+



Excel Database Includes



Report Edition	Model Name	Model Image	Infotainment image	Feature specific images 1	Features Specific images 2
Jan	NIO ET9				
Feb	Dongfeng Forthing Xinghai S7				

Excel Data Points:
1,100+

Models Covered:
7

Vehicle Services Covered:
70+



Request the price

A screenshot of the SBD software interface is shown within a white-bordered box. The interface features a dark theme with multiple panels. On the left, there are several data cards with charts and text. On the right, there is a map view. At the bottom of the screenshot, the SBD logo is visible on the left, and the text "MONTHLY HEAD UNIT CHINA UPDATE" is displayed on the right. Below the screenshot, there is a prominent blue button with the text "Request price" in white, followed by a white right-pointing chevron symbol (>).



Contact SBD Automotive

Do you have any questions?

If you have any questions or feedback about this research report or SBD Automotive’s consulting services, you can email us at info@sbdautomotive.com or discuss with your local account manager below.



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