



Connected &  
Mobility Services

#628

# China Head-Unit Tracker

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.

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### 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.

### COVERAGE



GLOBAL



NA



CHINA



EUROPE

### FREQUENCY



Monthly



QUARTERLY



ONE-OFF

### PUBLICATION FORMAT



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POWERPOINT



EXCEL



ONLINE

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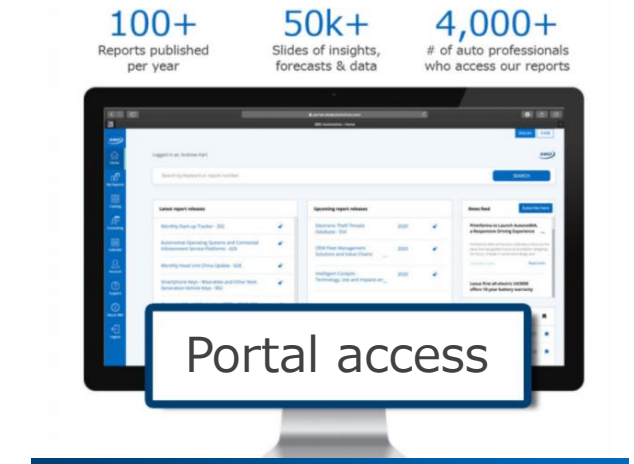
## Key questions answered

- > 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



## Do I have access?



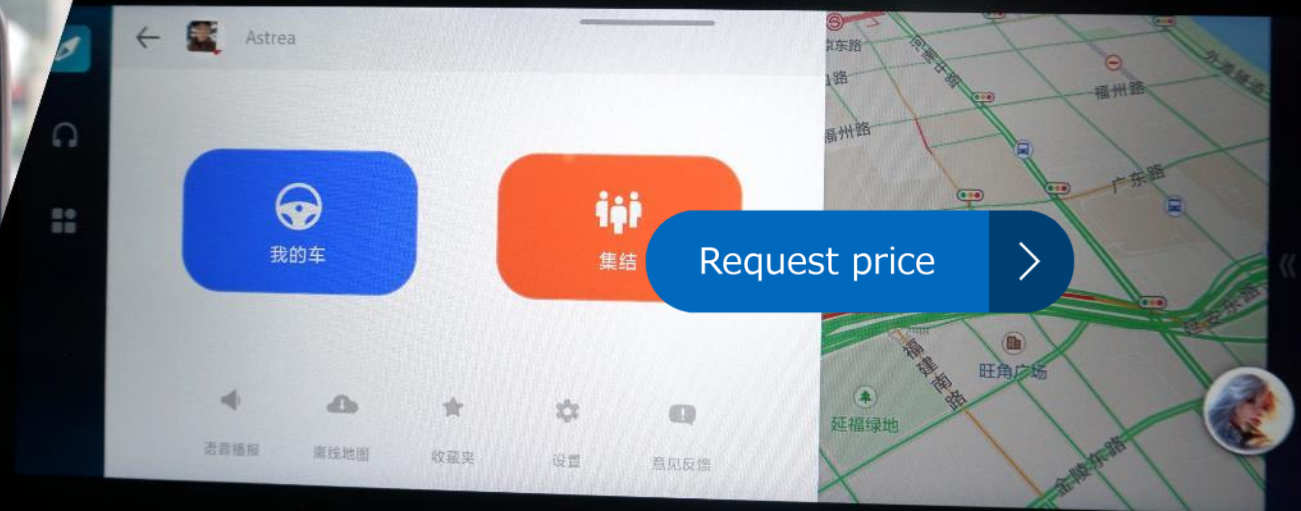
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China Head-Unit Tracker  
Monthly Report for 2024

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MONTHLY HEAD UNIT CHINA UPDATE



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## Introduction

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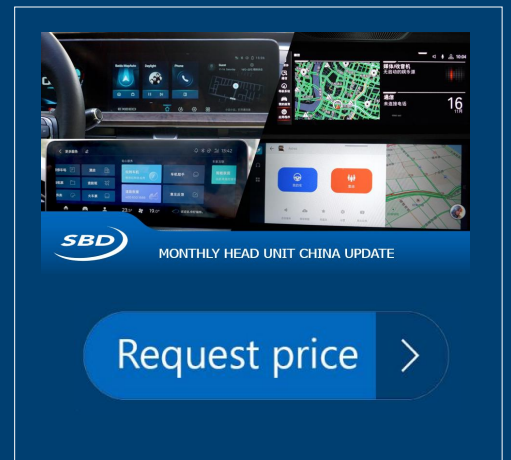
# Introduction

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

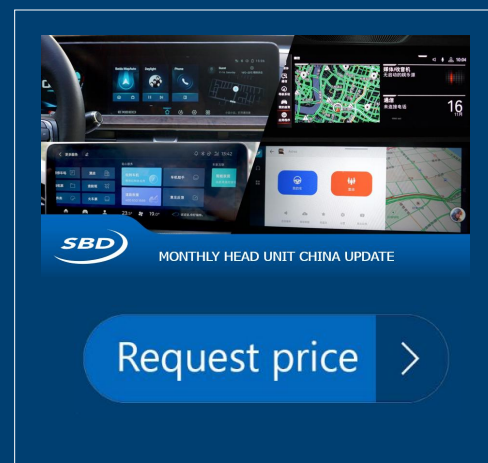
- Supplied by iFlytek, Honda S7's VPA has several voice skills and highlights:
  - Continuous dialogue
  - Dialect recognition
  - Four sound-zone recognition
  - Wake-up free
  - Intergration with 2 LLM: Supplied by Doubao & AliCloud Tongyi
  - Various avatar expressions
- **SBD insight:** The Honda 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



# What the Excel Version Contains





# Excel Database Includes

<div> 628-25-03</div>		Monthly Head Unit China Update								
		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

#628/Monthly Head-Unit China Update



## 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					

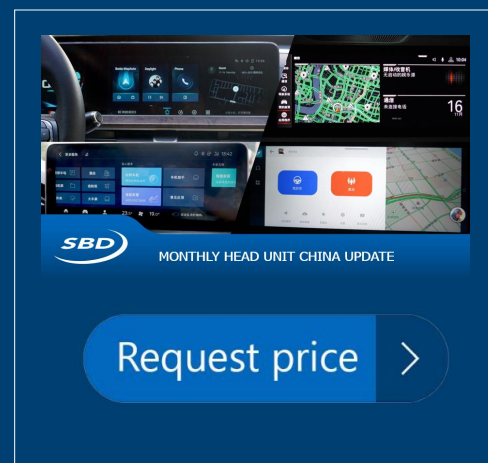
Excel Data Points:  
**1,100+**

Models Covered:  
**7**

Vehicle Services Covered:  
**70+**



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# 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](mailto:info@sbdautomotive.com) or discuss with your local account manager below.



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