2025 Shanghai Autoshow

Contents

01.1
Highlights and Analysis of Shanghai Auto Show Models

The 2025 Shanghai Auto Show attracted over 1,000 domestic and international companies, showcasing more than 150 debut models, including off-road vehicles, coupes, MPVs, and SUVs, with a reduced number of concept cars.

- Off-road vehicles are rapidly transitioning to "electrification + intelligence," enhancing range through plug-in hybrid and range-extender technologies while retaining rugged design elements like non-load-bearing bodies and triple differential locks. Chinese brands are accelerating their presence in the high-end off-road market, benchmarking international luxury brands.
- Sports coupe models focus on energy efficiency and intelligent interaction, with localized customization and generative AI assistants becoming key differentiators.
- Electric MPVs are emerging as brand flagships, blending business and family needs, emphasizing cockpit entertainment ecosystems. Range-extender powertrains address range anxiety, while rear-wheel steering enhances maneuverability.
- In the large luxury SUV segment, intelligent features are trickling down to mainstream markets, with plug-in hybrids and range-extenders balancing performance and eco-friendliness. Crossover designs like coupe SUVs are attracting younger buyers.

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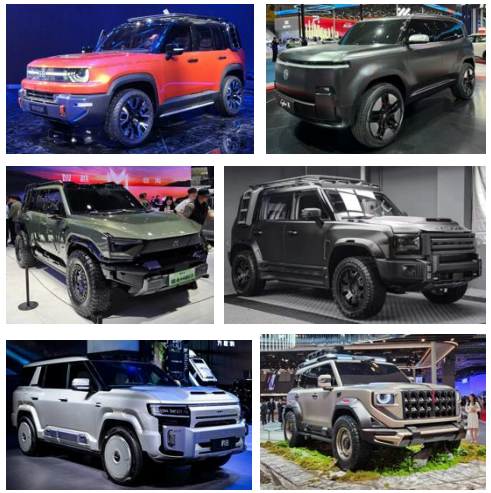
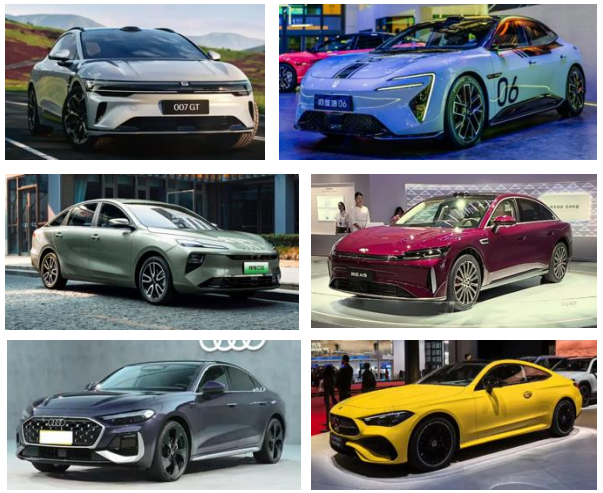
Off-road vehicles

- Rugged design + hybrid architecture lead the way.
- Global expansion accelerates adoption of new energy AWD.



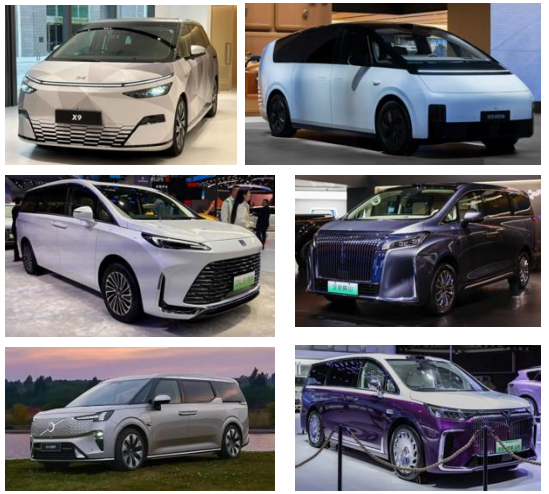
Sports coupe vehicles

- Electric platforms + advanced intelligent driver assistance as standard.
- Joint venture brands deepen localization strategies.



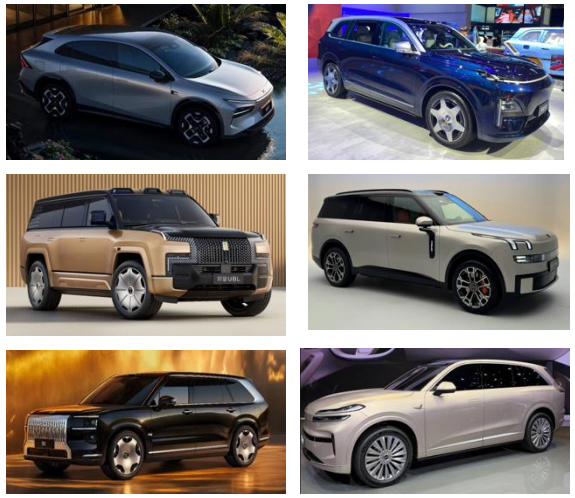
MPV

- Electric technology penetrates mid- to high-end Markets.
- Integration of family and business use cases drives intelligent upgrades.



MPV

- Six-seater models face intensified competition.
- Smart driving access and global strategies shape market trends.



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Concept cars at the 2025 Shanghai Auto Show highlight three key trends:

- **Localized design shines**: Brands like Volkswagen and BMW create China-specific models, blending Eastern aesthetics with local intelligent technologies.
- **Clear production focus**: Concepts like ID.ERA and Audi E5 Sportback are set for mass production, with tech configurations prioritizing practicality.
- **Accelerated tech integration**: Innovations like flexible screens, color-changing bodies, and AI-driven autonomous driving are rapidly implemented, transforming cars into smart mobile spaces.

- **ID. AURA**
Compact pure electric sedan, equipped with CMP platform and CEA architecture, fitted with Huawei Qiankun Intelligent Driving, supporting L3 conditional autonomous driving.

- **ID.ERA**
SAIC Volkswagen's first full-size range-extender SUV, featuring a circular light strip, with the production version set to closely retain the design.

- **ID. EVO**
Volkswagen Anhui's full-size pure electric SUV, based on a modular platform, supports four-wheel steering and 800V high-voltage fast charging.

- **BMW VDX**
Equipped with 18,000N•m wheel-side torque and a "Driving Control Super Brain," achieving millisecond-level response.

- **BMW iX3**
Features a dual kidney grille and minimalist line design, equipped with sixth-generation eDrive technology and an 800V high-voltage platform.

- **BMW i5 Flow NOSTOKANA**
Uses BMW's latest electronic ink technology,
allowing the patterns on the car body to change with the vehicle's color.

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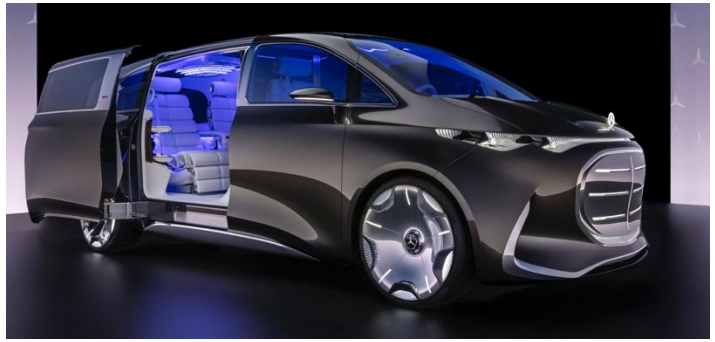
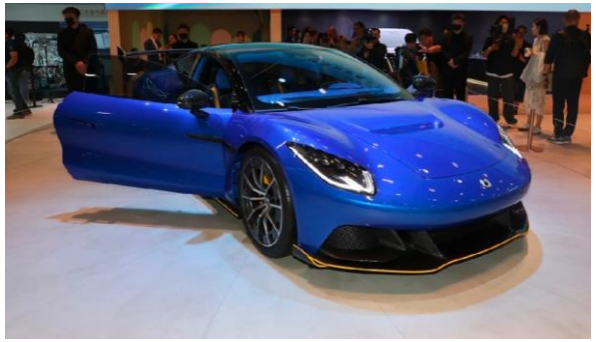


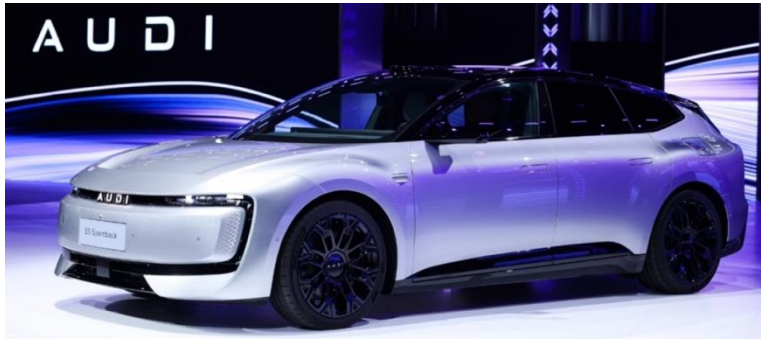
- **Mercedes Benz Vision V**

Pure electric MPV concept car, built on the VAN.EA platform, featuring a B-pillar-less sliding door design, equipped with a 64-inch flexible OLED screen and solar roof, supporting four-wheel steering.



- **Denzer Z**

Adopts the "Pure Emotion" design philosophy, equipped with the Yunni-M intelligent body control system, positioned as a high-performance track model.



- **Audi E5 Sportback**

Production version of the concept coupe, continuing Audi's avant-garde design language, designed by the creator of the iconic Audi RS6 wagon, while deeply integrating Chinese localization insights.

01.1.1
OEM camps diverge rapidly as tech giants and suppliers vie for automotive dominance

- The 2025 Shanghai Auto Show highlights distinct competition among new players, domestic brands, and joint ventures. New players focus on smart tech and global expansion, showcasing innovations like XPeng's RON robot with autonomous navigation. Domestic brands capture market share with broad price coverage and accessible tech, rolling out large SUVs like BYD Dynasty D and Zeekr 9X. Joint ventures balance enhanced fuel vehicle performance with electric breakthroughs, such as Audi's advanced driver-assistance system with Huawei and SAIC Volkswagen's range-extender ID.ERA concept, while cutting costs through local partnerships.

- Tech firms and suppliers emphasize intelligent driving algorithms, domain controllers, and AI cockpits, reshaping the traditional "OEM-Tier1" model and gaining influence through tech-driven products. In 2025, 23 suppliers entered the main vehicle hall, up 16 from 2021, showing tech firms' growing prominence.

	Technical Highlights	**Market Strategy**	**Global Deployment**	**Representative Models**	**Differences from Previous Auto Shows**
Emerging Brands	Humanoid robots (Xpeng IRON, Qiji Robot) Advanced intelligent driving assistance	Youth-oriented sub-brands (Jiyue Blue Firefly) High-end, high-volume models (JiYue M8/M9)	Overseas tech exports (Xpeng robot mass production), Penetration into Southeast Asian markets	Xpeng G9, Zeekr 001	Robots appear on a large scale for the first time, exceeding expectations
Domestic Brands	Large SUVs, Full-domain intelligent safety features	Full price coverage (BYD Sea Lion 06 at 100k+ RMB level, Geely Galaxy U8L at million RMB level), cost-performance competition	Localization of components (BYD self-developed chips), Overseas market expansion	BYD Sea Lion 06, Geely Galaxy L9X	Design convergence intensifies, market segments becoming saturated
Joint Ventures	Fuel performance vehicles (Mercedes-AMG G300), Range extender tech (ID.ERA range 1000km)	Return of classic fuel vehicles, New energy sub-brands	Local supply chain cooperation (Audi + Huawei smart driving solution), Integrated exhibition approach	Audi E5 Sportback, VW ID.ERA	Automation shifts from passive defense to active offense

01.1.1
OEM camps diverge rapidly as tech giants and suppliers vie for automotive dominance

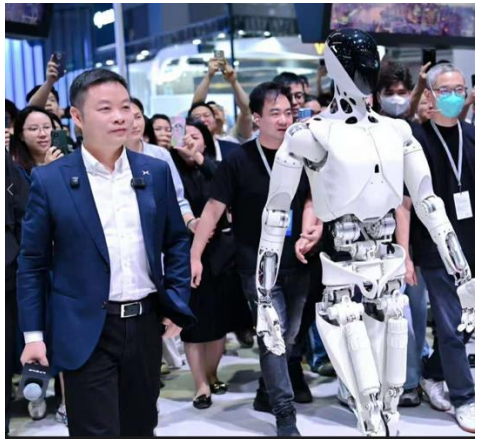
The differences between the 2025 Shanghai Auto Show and previous editions in terms of OEMs

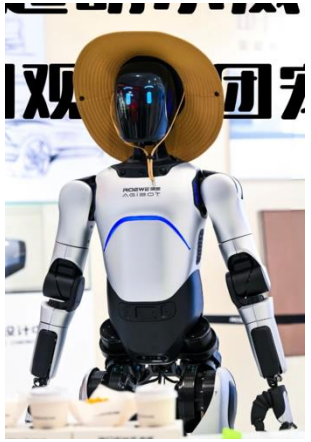
No.	Key Theme	Description
①	Pragmatic Orientation	Concept car presence reduced by 50%; focus on launching mass-production models within one year
②	Domestic Supply Chain Emerges	Suppliers like CATL and Desay SV make joint appearances with automakers for the first time
③	Brand Consolidation	13 automakers absent (e.g., Lamborghini, NIO); traditional automakers exhibit under unified brands
④	Deepening Internationalization	International visitor share increased by 30%; Chinese automakers accelerate tech exports

01.1.2

New players: Global market expansion × Robot ecosystem development × Urban NOA driving smart tech dominance

- New Market Forces: Focusing on new vehicle direction, with a 50% drop in car ownership, emphasizing shared use.
- Humanoid Robots: Leveraging humanoid robot technology, such as the XPeng RON and ZhiPu robots, to achieve millisecond-level responses.
- Real-time Optimization: Integrating real-time optimization with high-compute platforms for enhanced performance.
- NOA Advanced Driving: Featuring NOA (Navigate on Autopilot) advanced driving technology, with over 80% of models supporting L3 conditional autonomous driving, powered by the Yunni-M intelligent body control system and a "Driving Control Super Brain."
- Global Expansion: Accelerating global market penetration, with a focus on Southeast Asia and other regions, driven by localized insights and partnerships.





New players: Global market expansion × Robot ecosystem development × Urban NOA driving smart tech dominance

Characteristics and Strategies of Emerging Automakers at the 2025 Shanghai Auto Show

Brand	Key Features	Strategy
Huawei smart cockpit	Integrated smart cockpit ecosystem; first to equip fuel vehicles with intelligent driving systems	Huawei tech at the core; promoting multi-brand cockpit-driving system integration
XPeng	Humanoid robots + smart driving algorithm integration; rapid overseas order growth	Accelerating globalization; in-house chips reduce costs
Li Auto	Self-developed "Mind GPT" large model; covers full-scenario family cars	Deepening family user market; parallel development of EVs and range-extender tech
NIO	Multi-brand matrix (LeDao / Firefly); pure vision solution deepening	Equalized advanced tech; global layout (Europe engineering center under construction)
Xiaomi	First auto show appearance; high buzz; intelligent cockpit driven by ecosystem	Cross-industry + AIoT ecosystem integration (cooperating with OPPO)
Leapmotor	Mass-market smart driving at ¥150,000 level; meets youth-oriented demands	Value-for-money strategy; strengthening dual-power layout (EV + range-extended)

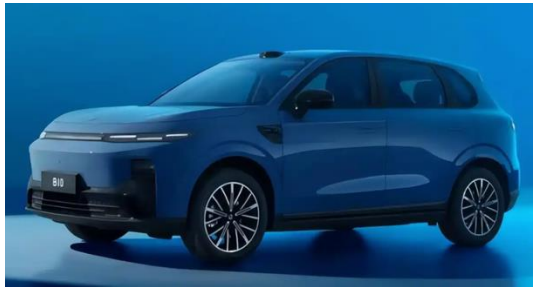
01.1.2
Domestic brands: Full-stack tech breakthroughs × High-end SUV market focus × Faster global expansion

- **Breakthroughs in full-stack in-house R&D capabilities:**
  Covering battery materials, chip design, and intelligent driving algorithms, forming a vertically integrated technology ecosystem from hardware to software systems, and reducing reliance on external supply chains.
- **Deepening presence in the high-end SUV market:**
  Using large 6-/7-seat SUVs as an entry point, enhancing competitiveness through seat comfort, multi-screen interaction, and upgraded features like air suspension, targeting market share from both household and commercial high-end users.
- **Accelerated globalization strategy:**
  Establishing overseas factories, deploying regional supply chains, building localized brand operations across multiple routes, breaking traditional trade barriers, and exploring new cooperation models such as technology licensing and joint R&D.

01.1.2
Domestic brands: Full-stack tech breakthroughs × High-end SUV market focus × Faster global expansion

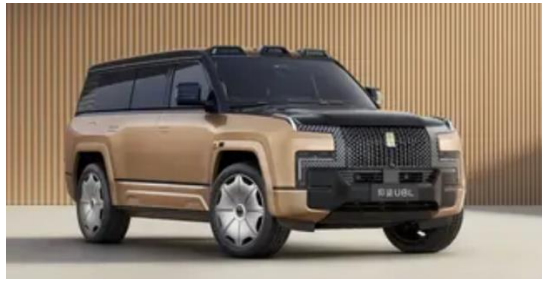
Comprehensive penetration of intelligence

Domestic brands are making rapid progress in areas such as intelligent driving and smart cockpits. Technologies like LiDAR and NOA are being adopted in models priced as low as RMB 150,000 (e.g., Leapmotor B01). Chips like Qualcomm 8295 and large AI models have become mainstream configurations.



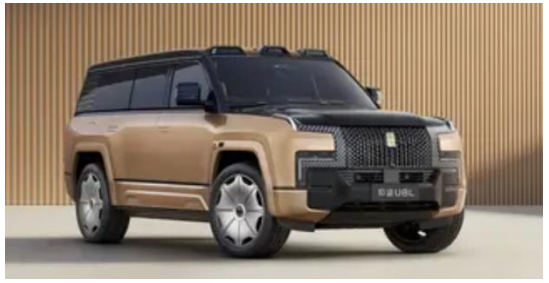
Advancement in premium and luxury positioning

Brands like BYD (Yangwang) and Hongqi are launching million-level luxury models (e.g., Yangwang U8L, Hongqi custom editions), incorporating 24K gold trims and intangible cultural heritage elements to challenge the traditional luxury market.



In-house R&D and supply chain collaboration

BYD's "DiSus-Z" features integrated body control with hydraulic suspension and ultra-fast flash charging, enabling simultaneous oil and electric refueling. Great Wall has developed V8 engines to break through internal combustion technology barriers, while also accelerating intelligent supply chain deployment with partners like Bosch.



Deepening globalization strategy

Brands such as Chery and Leapmotor are attracting international media attention. Leapmotor is expanding overseas markets with high performance-to-price ratio and cutting-edge technology.

02.1

Intelligent driving technology is guided by safety and intelligence, with AI-powered EVs advancing from L2++ level assisted driving to L3 level conditional autonomous driving

- Intelligent driving technology is advancing toward higher levels, with enhancing intelligence and ensuring safety as top priorities. In the field of large intelligent driving models, companies like Momenta are integrating reinforcement learning to optimize AI models, pushing driving capabilities beyond human levels.
- In the domain controller segment, high performance and cost-effectiveness are becoming dominant trends, with Lenovo Vehicle Computing supporting the development of L2++ domain controllers.
- On the operating system front, Neusoft Reach and Huawei's Qiankun Intelligent Driving are focused on developing efficient OS platforms that support higher levels of autonomous driving.
- As for intelligent driving chips, companies like AXERA and Black Sesame Technologies are prioritizing safety and intelligence, accelerating the development of chips tailored to both domestic and international markets.

Intelligent driving technology is guided by safety and intelligence, with AI-powered EVs advancing from L2++ level assisted driving to L3 level conditional autonomous driving

- **Intelligent driving foundation models: Evolving large models through innovative technologies**

R6 Flywheel Foundation Model
The R6 Flywheel Foundation Model is built on reinforcement learning, enabling it to explore new driving behaviors in simulated environments. By learning from its own successes and failures, it rapidly evolves and improves autonomously. This self-driven growth allows the model to potentially surpass human drivers in terms of safety and reliability.

- **Intelligent driving domain controller: Ensuring high performance and cost-effectiveness**

Lenovo 联想

L2++ Assisted Driving Domain Controller AH1
Lenovo Vehicle Computing designed the AH1 based on the NVIDIA DRIVE Thor-U platform to meet the demands of L2++ assisted driving. It delivers ultra-high computing power of 700 TOPS, nearly three times that of the previous-generation Orin-X. The AH1 stands out for its high performance and excellent cost-effectiveness.

Intelligent driving technology is guided by safety and intelligence, with AI-powered EVs advancing from L2++ level assisted driving to L3 level conditional autonomous driving

- **Intelligent driving operating system: Balancing efficiency and intelligence**

NeuSAR OS
NeuSAR OS serves as the neural hub at the vehicle level, enabling efficient cross-platform and cross-domain development. It accelerates the deployment of intelligent features in vehicles and fully supports the implementation of smart functions across the entire vehicle, helping automakers strike a balance between cost and innovation.

Qiankun Intelligent Driving ADS 4
Huawei's Qiankun Intelligent Driving ADS 4 adopts the WEWA architecture (World Engine + World Behavior Architecture), designed for the era of future autonomous driving. It achieves a 50% reduction in end-to-end latency, a 20% improvement in traffic efficiency, and a 30% reduction in hard braking rate.

Intelligent driving technology is guided by safety and intelligence, with AI-powered EVs advancing from L2++ level assisted driving to L3 level conditional autonomous driving

- **Intelligent Driving Chips:** Providing reliable and secure chip platforms for smart vehicles

M57 Series Chips
The AXERA M57 series is technically tailored to meet overseas L2-level assisted driving requirements. It enhances ASIL-B functional safety and complies with both domestic and international information security standards. The entire product line is certified under ISO/SAE 21434:2021 for automotive cybersecurity.

Secure Intelligent Base
Black Sesame Technologies has launched the Secure Intelligent Base, a cross-domain fusion platform built around the C1200 family of chips. Centered on the principles of "safety first, scalable computing power, and comprehensive coverage," it provides automakers and users with efficient and reliable solutions.

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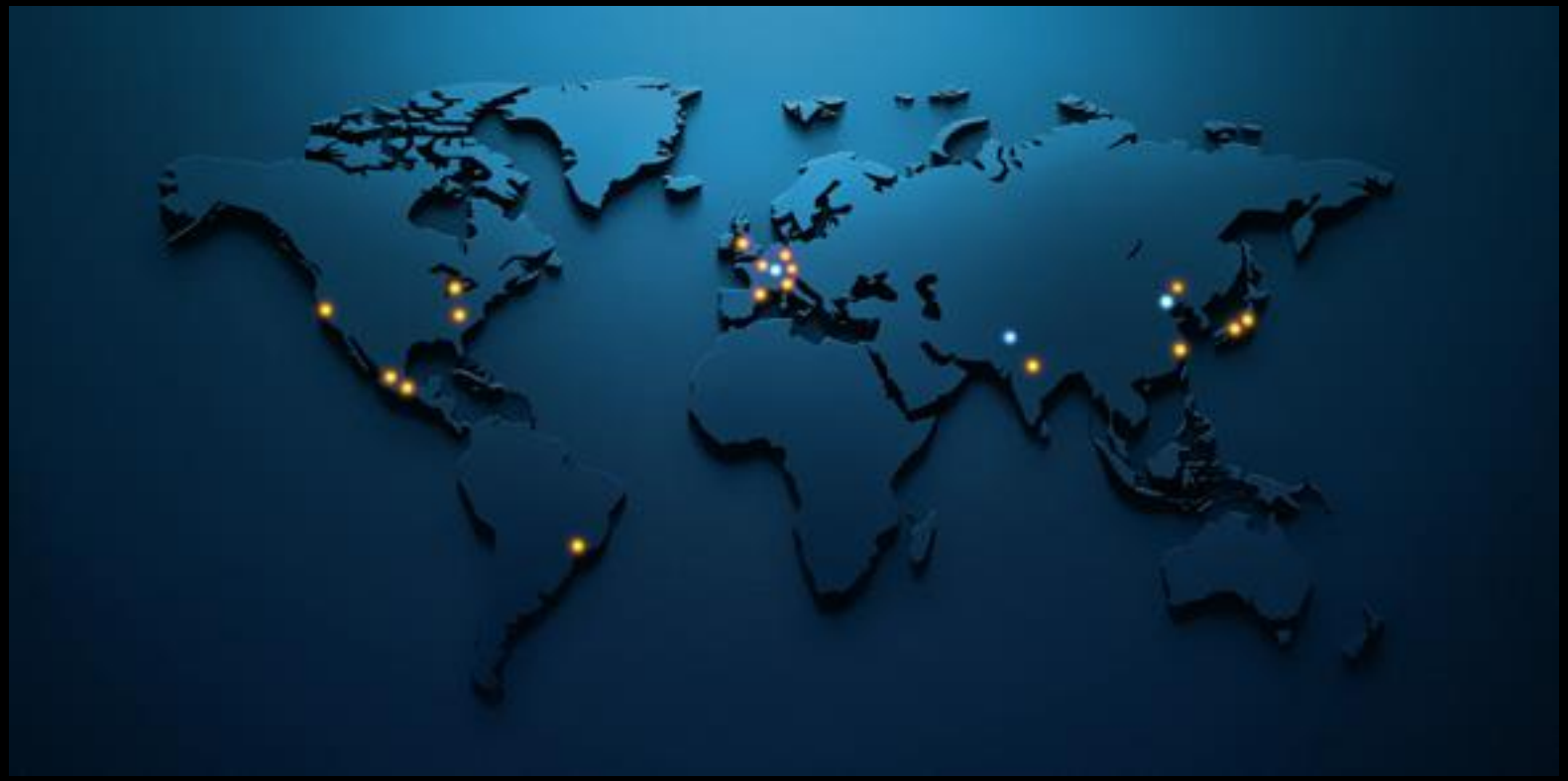

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