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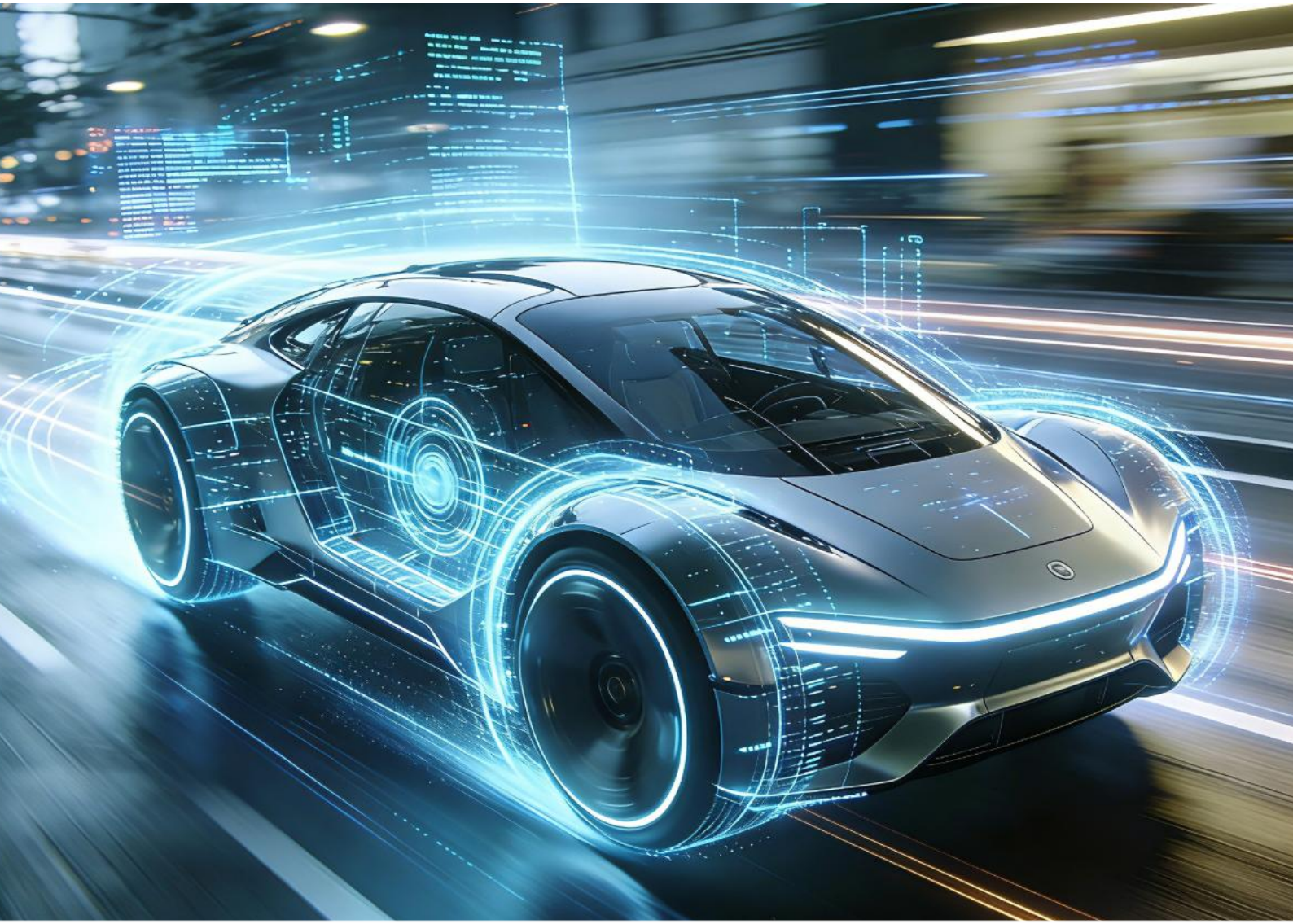

Global Smart Driving Chip Industry Report

Executive Summary

The smart automotive value chain is composed of three key segments. The upstream includes hardware suppliers responsible for manufacturing, packaging and testing. The midstream covers smart driving chips and supporting software algorithms, which together form complete smart driving solutions. These enable the development and deployment of smart driving functions. The downstream is made up of OEMs, who integrate these technologies into vehicles.

Smart driving chips, alongside software algorithms, serve as the “brain” of smart vehicles, defining their level of intelligence, affecting both the vehicle’s reaction speed and its upper intelligence limit. Their performance directly impacts the ability to process large volumes of sensor data, from cameras, radars and other inputs, and to make timely, accurate driving decisions. This ensures stable and responsive operation across varied driving scenarios.

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1. Market Overview

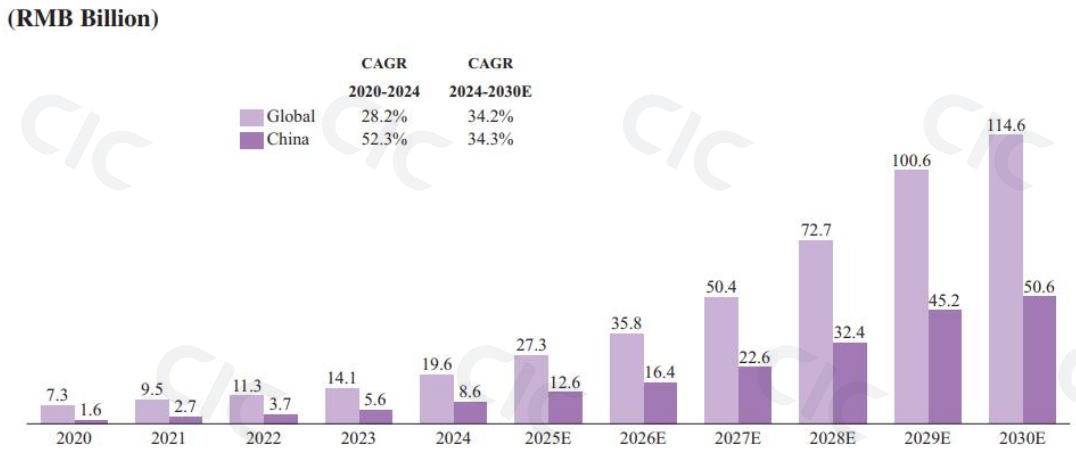
1.1 Market Definition

The smart driving chip market is poised to grow in tandem with the smart vehicle industry. Smart vehicles are empowered by smart vehicle AI chips. As the penetration of smart vehicles accelerates, demand for high-performance AI chips—serving as the computing core of smart driving—will also enter a high-growth trajectory.

1.2 Market Size

The global and China's market sizes for smart driving chips are expected to grow from **RMB19.6 billion** and **RMB8.6 billion** in 2024, to **RMB114.6 billion** and **RMB50.6 billion** by 2030, representing CAGRs of 34.2% and 34.3% from 2024 to 2030, respectively.

Global and China's Smart Driving Chip Market Size, 2020–2030E



Source: CIC Reports

2. Future Outlook

Beyond enabling smart driving, AI-powered smart vehicle chips also encompass ones that can be used in other settings, for instance, in CMS, DMS and OMS. With increasing regulatory pressure and safety evaluation integration, they are expected to become standard features in future vehicles.

The global market size of smart vehicle chips used in CMS, DMS and OMS are expected to grow from over **RMB1 billion** in 2024 to over **RMB10 billion** in 2030.

Notes:

·AEB (Automatic Emergency Braking) is a function that leverages camera and radar sensing to continuously monitor the road ahead, providing proactive warnings and automatically applying the brakes when a collision risk is detected.

·CMS (Camera Monitoring System) is a function that replaces traditional rear-view mirrors with external cameras, providing real-time visual perception around the vehicle to expand the field of view and enhance driving safety.

·DMS (Driver Monitoring System) is a function that uses in-cabin cameras to continuously monitor the driver's state of fatigue, attention, and related behaviors, to prevent risks and ensure driving safety.

·OMS (Occupant Monitoring System) is a function that detects the number, position, and behavior of occupants inside the vehicle, enabling intelligent air conditioning, airbag control, and occupant reminder features.

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CIC is a professional consulting firm offering tailored end-to-end support across the full investment and financing lifecycle. The firm boasts a world-leading track record in guiding landmark first-in-sector IPOs across global markets, alongside unrivaled reach and in-depth coverage capabilities across specialized niche market segments.

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CIC Reports & Industry Overview

At CIC, we employ a rigorous, multi-method research framework, combining primary and secondary sources to underpin our analysis. Primary research involves in-depth engagements with industry thought leaders and practitioners, particularly in supply chain finance. Secondary research synthesizes publicly available datasets from authoritative bodies, including the National Bureau of Statistics of the People's Republic of China, the State Administration of Financial Regulation (SAFR, formerly the China Banking and Insurance Regulatory Commission), the China Securities Regulatory Commission (CSRC), and public company filings. We apply proprietary data analytics frameworks to process collected information, validating findings through cross-referencing data from multiple research streams to ensure analytical rigor and reliability.

All statistical data presented is verifiable and grounded in information available as of the date of this report.

Extracts are refined summaries of in-depth CIC industry research reports, highlighting supply and demand trends, key growth drivers, R&D trends and future outlook, etc. of various segmented fields, integrating multi-dimensional insights such as expert interviews, market surveys and industry data analysis.

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