

2023上海国际车展： 自主新能源技术百花齐放

2023 Shanghai International Auto Show:
Domestic EV Technologies are Blooming

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1. 2023上海车展核心要点

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3. 车企核心观点

2023上海车展核心要点

- 国内新能源玩家均有重磅新车或纯电战略发布，传统车企全系电动参展显决心，整车车展150余款新车NEV占2/3，进一步挤压燃油车份额
- 仰望、蔚来、极氪等关注度很高，合资德系日系展台遇冷
- 插混或增程为主要技术路线的车企开始转向纯电，普遍推出大于600km的长续航里程纯电车型
- 无框车门、电吸门、座椅多级电动调节、hud、空悬等豪华配置在大众市场开始规模上车
- 极氪、哪吒等国内车企宣布进军欧洲，新能源出海进程加速
- ADAS成车企智能化主战场，宣传很少提及L4，逐渐回归理性聚焦落地的场景，L2-3级智驾解决方案内卷加剧
- 车企和供应商边界逐渐被打破，汽车产业链分工从OEM、Tier1、Tier2的层级结构转变为生态圈结构
- 国产激光雷达厂商上车情况碾压海外厂商，速腾超半数展现先发优势，规模效应初显

- 自主传统品牌:

比亚迪仰望U8、腾势N7、极氪X、领克08、长安深蓝S3、吉利银河L7

- 新势力品牌:

小鹏G6、蔚来ES6、问界M5智驾版、问界M9

自主品牌：比亚迪仰望U8

- 定位为百万级新能源硬派越野车，预售价**109.8万元**。
- 动力与驾控系统：搭载易四方技术，由四电机独立驱动，从感知、决策、执行三个维度以毫秒级的速度独立调整车辆四轮轮端动态；整车马力超**1100匹**，**0-100公里/时加速3秒级**。最长CLTC工况综合续航达**1000km**。搭载云辇-P智能液压车身控制系统。
- 座舱系统：搭载“星环座舱”，智能随动座椅。配备了智能语音交互系统、车联网等多项智能配置，可以实现远程控制、远程升级等功能。
- 智能驾驶：整车配备了**38个**高清感知原件，包含了**3个**激光雷达、**5个**毫米波雷达、**14个**超声波传感器和**16个**摄像头。配备了多项主动安全技术，如盲点监测、自适应巡航、车道偏离预警等。

图：比亚迪仰望U8亮相上海车展



资料来源：网易，海通国际

图：比亚迪仰望U8内饰



资料来源：仰望官网，海通国际

自主品牌：比亚迪腾势N7

- 腾势N7亮相上海车展，定位为智能豪华猎跑SUV，内饰全球首秀。
- 动力系统：腾势N7提供单电机和双电机四驱版，四驱版前后电机最大功率分别为160/230kw。1.5T插混版纯电CLTC续航190km，综合最大CLTC续航高达1040km，纯电版本的最大CLTC续航超700km。搭载云辇A智能车身控制系统（标准版）。
- 座舱系统：搭载腾势Link超智能交互座舱，融合百万应用生态，集成5G技术，帝瓦雷音响、AR-HUD、六联屏的沉浸式智能场景。
- 智能驾驶：搭载腾势Pilot高级智能驾驶辅助系统，配备双高感知激光雷达，可实现全场景智能驾驶辅助。

图：腾势N7亮相上海车展



资料来源：网易，海通国际

图：腾势N7内饰



资料来源：公司官网，海通国际

自主品牌：极氪X

- 极氪X亮相上海车展，定位紧凑级新奢全能SUV，官方售价18.98-20.98万元。
- 动力系统：搭载高性能永磁同步电驱动系统，双电机四驱峰值功率315kW，峰值扭矩543N·m，零百加速仅需3.7s，最大CLTC续航里程达560km。
- 智能座舱：极氪X采用了数字化座舱，配备了12.3英寸液晶屏和智能语音交互系统，实现了车辆信息的实时展示和控制
- 智能驾驶：全系装载由5颗摄像头、5颗毫米波雷达，以及12颗超声波雷达，组成的ZAD智能驾驶辅助系统，拥有全速域主动巡航、大车主动偏移避险、盲点监测、遥控直入直出泊车等10余项智能驾驶辅助功能。

图：极氪X亮相上海车展



资料来源：汽车之家，海通国际

图：极氪X内饰



资料来源：公司官网，海通国际

自主品牌：领克08

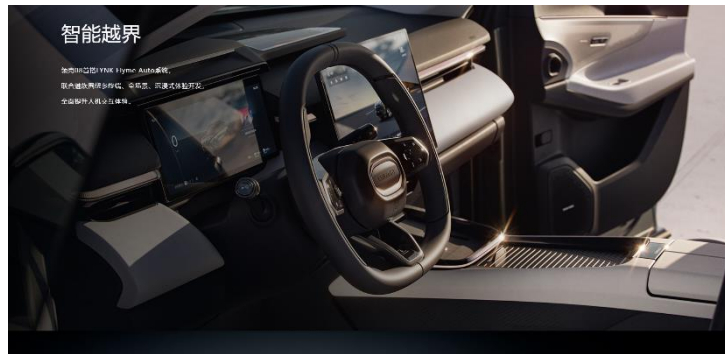
- 车展首发，定位中型新能源SUV，售价18.98-20.98万元。
- 动力系统：EM-P超级增程电动方案支持三电机四驱，包含一个全新的独立后驱电机，综合功率超过400kW，最大扭矩超过900N·m。搭载39.6kW·h三元锂平板电池，CLTC最高综合续航里程达到1400km，纯电CLTC续航里程最高为245km。
- 座舱系统：搭载如然空调、流光环绕氛围灯、哈曼卡顿23扬声器、92英寸无界AR-HUD等技术
- 智能驾驶：首搭安托拉1000 Pro计算平台+ LYNK Flyme Auto，拥有NPU 16TOPS(int8)、GPU 1800G(FLOPS)的超强总算力。

图：领克08亮相上海车展



资料来源：太平洋汽车，海通国际

图：领克08内饰



资料来源：领克官网，海通国际

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自主品牌：长安深蓝S7

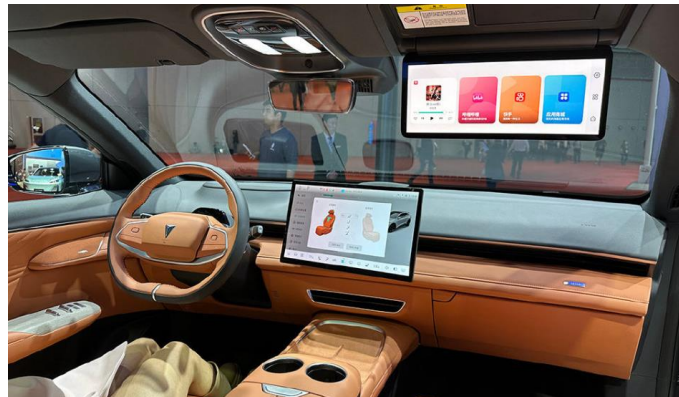
- 首次独立参展，定位中型纯电动SUV，售价20万元左右。
- 动力系统：纯电版车型有520km/620km两款车型可选，百公里加速时间最低只需6.7秒，最低电耗达到14.2kWh/100km；增程版车型馈电油耗最低仅需4.95L/100km，CLTC纯电续航可达200km，CLTC综合续航可达1120km；氢电版搭载深蓝自研的氢燃料电池系统，CLTC氢耗低至0.73kg/100km。
- 座舱系统：副驾超感智慧屏联动数字座舱，1.9m²超大全景天幕，大尺寸AR-HUD抬头显示系统。
- 智能驾驶：L2级别辅助驾驶、自适应巡航以及自动跟车、远程挪车、遥控泊车、领航辅助驾驶等等功能。

图：深蓝S7亮相上海车展



资料来源：腾讯网，海通国际

图：深蓝S7内饰



资料来源：爱卡汽车，海通国际

自主品牌：吉利银河L7

- 定位紧凑型 SUV，预计售价将在15-30万元之间。
- 动力系统：搭载雷神1.5T混动专用发动机，由P1+P2双电机组成的3挡DHT Pro智能电驱，百公里加速最快可达6.9s，CLTC综合续航至高1370km。
- 座舱系统：四屏联动，搭载“8155旗舰级座舱芯片+吉利银河专属原生智能座舱系统银河NOS”，智爱座舱是一个集“高颜值、双算力、易操作、全感官、全域FOTA”于一体的超级智能终端。
- 智能驾驶：基于GEEA2.0 电子电器架构打造，支持娱乐域+车身域+底盘域+动力域的全车升级。

图：银河L7亮相上海车展



资料来源: Zaker, 海通国际

图：银河L7内饰



资料来源: Zaker, 海通国际

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自主品牌：小鹏G6

- 定位超智驾轿跑SUV；为小鹏SEPA2.0扶摇架构首款战略车型
- 动力与驾控系统：搭载了全新XPower动力系统，基于800V高压SiC平台打造。标配3C电池，可实现“充电10分钟，续航300公里”超充体验，cltc续航里程最高达755km。采用前后一体式铝压铸技术与CIB电池车身一体化技术，从安全、操控、续航全方位提高整车性能。
- 智能座舱：搭载Xmart OS 4.0智能车机系统，基于XEEA-3.5电子电器架构打造，智能体验迭代周期缩短30%，OTA速率提高300%。
- 智能驾驶：搭载XNGP智能辅助驾驶系统，拥有超强环境感知能力，可实时生成“高精地图”。

图：小鹏G6亮相上海车展



资料来源：懂车帝，海通国际

图：小鹏G6内饰



资料来源：懂车帝，海通国际

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自主品牌：蔚来全新ES6

- 定位中大型SUV，4月18日开启预定，5月下旬将正式发布；内饰首度公布。
- 动力系统：采用前后双电机，零百加速4秒级，前后电机最大功率为150kw/210kw；电池版本为75/100kwh，cltc续航最高可达625km。
- 座舱系统：搭载NOMI交互系统；配备23个扬声器的7.1.4杜比全景声音响系统；201英寸AR大屏
- 智能驾驶：基于NT2.0平台，拥有1016TOPS算力；标配Aquila蔚来超感系统和ADAM蔚来超算平台，支持全新NAD自动驾驶技术系统。

图：蔚来全新ES6亮相粤港澳大湾区车展



资料来源：汽车之家，海通国际

图：蔚来全新ES6内饰



资料来源：懂车帝，海通国际

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自主品牌：问界M5智驾版

- 共推出4款车型：增程后驱、四驱版，纯电后驱、四驱版，售价分别为27.98/29.98/28.98/30.98万元。
- 动力系统：通过对增程器进行轻量化改良，CLTC纯电续航提升至255km，综合续航提升14.7%达到1425km。
- 座舱系统：采用华为鸿蒙智能座舱，新增HUAWEI MagLink魔吸车载接口，支持27w充电，可实现前后排互动、双屏显示等功能；配备软硬融合深度调校的空间音频以及智能感知功能可全方位自动调节座椅位置、HUD高度和后视镜位置。
- 智能驾驶：搭载HUAWEI ADS 2.0高阶辅助驾驶系统，配备1颗激光雷达、3颗毫米波雷达、11个摄像头组以及12颗超声波雷达，具备智能领航辅助以及智能泊车辅助功能。

图：问界M5智驾版亮相上海车展



资料来源：太平洋汽车，海通国际

图：问界M5智驾版内饰



资料来源：太平洋汽车，海通国际

自主品牌：问界M9

- 本次车展正式发布，定位六座全景智慧旗舰MPV，售价50-60万，内饰暂未公布，预计将在Q4正式面世。
- 标配空气悬架+CDC；采用一体压铸铝车身以及全铝合金底盘；采用双反射镜头数字投射大灯。
- 智能座舱：搭载施罗德散射声学技术以及基于AI大规模的车载人工智能；拥有10屏满配与全场景协同能力，重新定义智慧空间。
- 智能驾驶：AR-HUD和HUAWEI ADS首次实现深度融合，可自由调控车载大屏大小。

图：问界M9外观



资料来源：AITO问界公众号，海通国际

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- 华为
- 比亚迪
- 新势力：蔚来、理想、小鹏
- 传统自主品牌：吉利、长城
- 合资品牌：上汽、广汽
- 国际品牌：劳斯莱斯

华为：坚持智能化创新发展道路

•AITO问界M5智驾版共推出4款车型，首搭全新融合感知系统。在智能辅助驾驶方面，问界M5智驾版首发HUAWEI ADS 2.0高阶智能驾驶系统，具备智能领航辅助以及智能泊车辅助功能，预计Q4无图商用高阶驾驶覆盖45个城市。此外，问界M5智驾版还配备了全铝合金底盘以及HUAWEI DATS在颠簸路面可以动态识别路况，智能调整扭矩，大幅提升平顺性。我们认为，搭载具备软硬件结合的全新融合感知系统的华为ADS 2.0或将极大提升问界M5智驾版的产品力，在一定程度上助力M5的销量增长。

•AITO问界M9首次面市，定位六座全景智慧旗舰MPV。在智能座舱方面，问界M9搭载了施罗德散射声学技术以及基于AI大模型的车载人工智能，10屏满配和全场景协同能力重新定义了智慧空间。在智能驾驶方面，AR-HUD和HUAWEI ADS在M9上首次实现深度融合，可自由调控车载大屏大小。我们认为，搭载AI大模型车载人工智能以及HUAWEI ADS的旗舰MPV问界M9的问市或将加剧电动车智能化下半场的激烈竞争，推动电动车行业的智能化发展。

图：华为智能驾驶联合规划控制



资料来源：AITO 问界公众号，海通国际

比亚迪：云辇产品矩阵全面提高整车性能

- 4月11日比亚迪推出云辇产品矩阵，包含了云辇-C、云辇-A、云辇-P、云辇-X等产品， 将从舒适、操控、安全、越野等维度大幅提升消费者的驾乘体验。
- 云辇-C智能阻尼车身控制系统：实现车辆舒适性和运动性的完美兼容， 目前硬件已搭载在比亚迪汉、唐以及腾势D9的三款车型。
- 云辇-A智能空气车身控制系统：让系统的高度、刚度、阻尼三项可以调节，提供极致的舒适性、支撑性与通过性， 满足用户的多样化需求。
- 云辇-P智能液压车身控制系统：能够实现超高举升、四轮联动、露营调平等超强越野功能，塑造全球豪华越野新巅峰,将首搭仰望U8。
- 云辇-X全主动控制技术：可以实现“0”侧倾、“0”俯仰，代表了全球车身控制系统的最高水平，将首搭仰望U9。
- 云辇产品矩阵的建立将全面提高比亚迪车系的整车性能，提升产品竞争力，持续巩固比亚迪国内新能源一哥的地位。

图：比亚迪仰望U9



资料来源：公司官网，海通国际

比亚迪：向新能源高端市场发起冲击

- 新上市仰望U8亮相：仰望U8定位为百万级新能源硬派越野车，预售价为109.8万元，有豪华版与越野玩家版两个版本。采用PHEV动力系统，搭载2.0T发动机+易四方四电机独立驱动，可对车辆四轮动态实现精准控制，大幅提升车辆在多种路况下的抓地力与操稳极限。最高可输出超过1100匹马力，轮端扭矩高达17000+Nm，0-100公里/时加速达到3秒级，最长CLTC工况综合续航达1000km。配备云辇-P智能液压车身控制系统，能够实现超高举升、四轮联动、露营调平等超强越野功能。
- 仰望U9亮相车展：U9定位为百万级纯电动性能超跑，售价与上市时间尚未公布。U9将搭载易四方平台技术，0-100公里/时加速达到2秒级。配备云辇-X智能全主动车身控制系统，可实现悬架高度快速调节，能够实现0侧倾和0俯仰的平稳行驶效果，在单侧前轮脱落的情况下依然可以平稳行驶。
- 我们认为，比亚迪仰望U8、U9的亮相标志着比亚迪正式进军高端新能源市场。比亚迪产品矩阵进一步丰富，由王朝网、海洋网、腾势和仰望四大品牌组成，实现低中高端车型的全覆盖。仰望作为高端品牌，是比亚迪“秀肌肉”的平台，代表了比亚迪的最强技术能力，对比亚迪品牌形象带来正面效果，有望吸引更多潜在消费者关注比亚迪。

资料来源：比亚迪官网，仰望汽车官网，海通国际

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小鹏：G6 “黑科技” 满满，有成为爆款潜质

G6亮相车展：

- G6定位中型轿跑SUV，是小鹏SEPA2.0扶摇架构首款战略车型。据发布会透露，G6拥有“超级智能”，“超级能效”，“超级驾控”等诸多技术亮点，可谓“黑科技”满满。
- 在智能方面，G6基于X-EEA 3.5电子电器架构打造，搭载了Xmart OS 4.0智能车机系统与XNGP智能驾驶辅助系统，智能化在行业中处于领先地位；在能效方面，G6是国内首个量产全域800V高压SiC碳化硅平台+3C电芯车型，可实现“充电10分钟，续航300公里”，将大幅提高用户补能体验；在驾控方面，G6是国内首次同时搭载前后一体式铝压铸与CIB电池车身一体化技术的车型，从安全、操控、续航全方位提高整车性能。

图：小鹏扶摇架构电驱综合效率对比



资料来源：小鹏汽车公众号，海通国际

图：X-HP智能热管理系统



资料来源：小鹏汽车公众号，海通国际

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小鹏：G6 “黑科技” 满满，有成为爆款潜质

- 此外G6在内外饰、车内空间表现也较为优异。过往被用户所诟病的痛点也在G6上得到了改善（如新增靠背座椅通风、配备双风冷高功率无线充电板、新增内置行车记录仪等）。我们认为，相较小鹏过往车型，G6更加注重消费者需求，定位更加精准，在配置和成本控制上都有较大优化，加上扶摇架构带来的技术亮点，若小鹏采取激进的定价策略，G6有望成为下半年的爆款车型。

图：小鹏G6车身尺寸



资料来源：小鹏汽车公众号，海通国际

图：小鹏G6前后排空间



资料来源：小鹏汽车公众号，海通国际

蔚来：加快充换电补能网络建设

补能设施建设进展：

•截止到4月18日，蔚来已建成1356换电站+14768充电桩，首批500kw超快充桩正式投递，累计提供20,650,000+次换电服务。第三代换电站已经开始部署，6月开始目标每月新增200个换电站。目标2023年新增1000座换电站，累计换电站达到2300+座；充电桩方面2023年计划新增10000根，年底累计达到24000根。现有52条Power up plan目的地加电路线，本次发布会宣布将Power up plan计划迭代为Power Journeys加电旅程计划，继续加大在自驾目的地的充换电基础设施建设。

近期展望：

•可换电一直以来是蔚来的核心亮点，蔚来原计划2023年新增400座换电站，现扩大目标至1000座，换电站的快速布局将提升用户的补能体验，持续巩固蔚来可换电的品牌优势。随着Power Journeys加电旅程计划的持续推进，纯电车长途自驾游体验将得到大幅提升，消费者对纯电车的续航里程焦虑将被逐步瓦解。目前在国内一线城市，高端市场的主销车型正从油车加速向电车转变，我们认为随着蔚来补能网络的完善，蔚来有望持续提高高端市场的占有率。

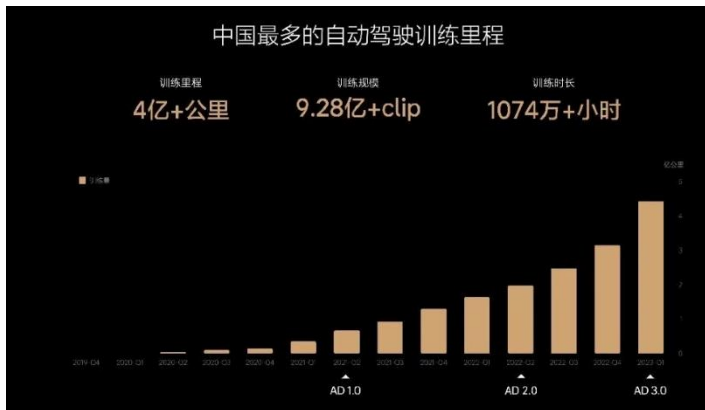
资料来源：蔚来官网，海通国际

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理想：落实双能战略，增程纯电齐驱并进

- 本次车展发布会理想分享了公司未来的双能战略：智能战略、电能战略。
- 在智能战略方面：主要包含了智能驾驶和智能空间的技术平台。智能驾驶的核心技术路线是通过静态BEV还原道路结构+动态BEV还原交通参与者+ Occupancy道路占用进行物理世界还原。现理想自动驾驶训练历程已达4亿+公里，为国内第一，训练时长达1074万+公里。理想AD max3.0将在本季度开始内测，年底覆盖100座国内城市，完全打通城市和高速场景。此外本次发布会中理想宣布了AD max3.0全场景NOA终身免费，AD max3.0能力也将会释放给AD pro3.0。

图：理想自动驾驶训练里程



资料来源：理想汽车公众号，海通国际

图：理想自动驾驶核心技术路线



资料来源：理想汽车公众号，海通国际

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理想：落实双能战略，增程纯电齐驱并进

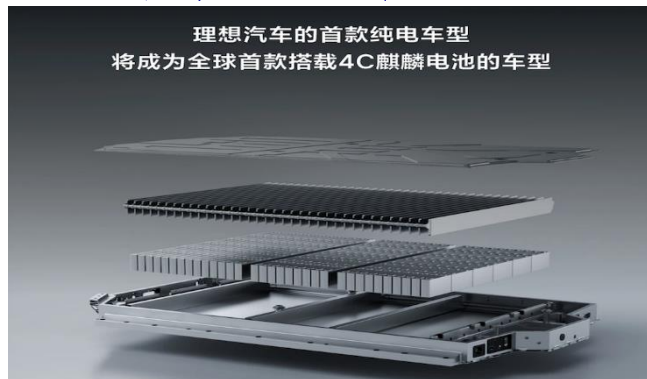
- 在电能战略方面：理想的纯电解决方案将支持800V超充，最高可实现“充电10分钟，续航400公里”。纯电车型将采用高压电驱+4C电池+宽温域热管理+超充网络，提升用户补能体验。此外将搭载自研SIC功率芯片、自研功率模块、全栈自研高压三合一电驱系统、自研高效热管理系统。理想2022年已经启动功率模块封装基地建设，预计年产能达到240万个半桥。其首款纯电车型将成为全球首款搭载宁德时代4C麒麟电池的车型，实现小于0.3毫欧超低内阻，最大5C超充能力。
- 在补能设施布局方面，理想年底将完成300+充电站建设，高速里程覆盖率达40%，2025年超充站将建成3000+座，全国高速里程覆盖率达90%。

图：理想全栈自研热管理模块



资料来源：理想汽车公众号，海通国际

图：理想首搭宁德时代4C麒麟电池



资料来源：理想汽车公众号，海通国际

理想：落实双能战略，增程纯电齐驱并进

- 此外公司透露在2025年面向20万以上市场，产品矩阵将包括5款增程电动，1款超级旗舰，5款高压纯电。我们认为，理想的纯电解决方案符合市场发展趋势，增程和纯电齐驱并进将有助理想更稳步向纯电方案进行过渡。随着AD max3.0的上线，理想将提升智能驾驶方面的优势，有望助力下半年销量持续增长。

图：理想2025年车型矩阵



资料来源：理想汽车公众号，海通国际

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传统自主品牌：加快向新能源赛道切换

吉利21款新能源产品阵列登场

- 极氪品牌：豪华猎装轿跑极氪001、全球首款原声纯电豪华MPV极氪009、新奢全能SUV极氪X首次合体亮相。极氪X官方售价18.98-20.98万元。双电机四驱零百加速仅需3.7s，后驱最大CLTC续航里程达560km。采用了数字化座舱，配备了12.3英寸液晶屏和智能语音交互系统；搭载ZAD智能驾驶辅助系统，拥有全速域主动巡航、大车主动偏移避险、盲点监测、遥控直入直出泊车等10余项智能驾驶辅助功能。
- 吉利品牌：吉利银河智能电混SUV银河L7首次亮相车展，定位智能电混SUV，搭载“智爱座舱”，智能化表现实现了领先一个代际的全面跃升；此外中国星·高端系列星越L Hi·P、吉利几何纯电系列几何G6、几何E、几何M6、熊猫mini等共9款新能源车登陆上海车展。
- 领克品牌：领克08首次亮相车展，定位智能大五座超电SUV，基于CMA Evo架构打造，搭载全新EM-P超级增程电动方案。此外领克01 EM-P、领克05 EM-P、领克06 PHEV、领克09 EM-P等新能源车也一同亮相。
- 睿蓝品牌：睿蓝7首发亮相，定位A级Coupe SUV，动力系统基于GBRC水晶架构打造，采用后置后驱的驱动形式，百公里加速最快可达4.9s，风阻系数为0.238cd。睿蓝7将配备不同容量的胶囊电池，CLTC续航里程达550—750km，可充可换可升级，满足不同续航需求。

资料来源：吉利汽车官网，海通国际

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传统自主品牌：加快向新能源赛道切换

长城超15款新能源亮相车展

- **长城炮6X6PHEV/HEV亮相：**定位大型高性能混动皮卡，售价**13.38-16.68万元**。搭载**2.0T+9HAT**混动系统，综合功率**300kW**，综合扭矩**750N·m**，**0-100km/h**加速时间仅需**6.9秒**。总电量达到**37kWh**，满足**110km**纯电续航，**900km**综合续航。能实现**L2+级智能驾驶辅助**级别，同级首创搭载**全自动泊车系统**。
- **坦克新能源：500Hi4-T** 定位中大型豪华越野新能源SUV，开启全球预售，预售价**36万元**；**坦克400 Hi4-T** 全球首秀，旨在打造独属于年轻人的第一台机甲科技越野车。全新升级的越野超级混动架构**Hi4-T**正式发布。
- **2023款芭蕾猫上市：**为欧拉首款全面搭载暖科技车型，售价**14.98-17.98万元**，新增**22项暖科技配置**，强化女性专属配置，提升女性友好体验。
- **2023款欧拉好猫GT木兰版上市：**定位年轻人的第一台电动GT，定价**14.38-16.9万元**。
- **哈弗新能源：**哈弗枭龙MAX、哈弗枭龙、哈弗二代大狗PHEV亮相车展。首搭全新智能四驱电混技术**Hi4**的哈弗枭龙Max专为新能源全场景高阶辅助驾驶需求设计。
- **魏牌：**魏牌高山DHT-PHEV与蓝山DHT-PHEV亮相车展，冲击大六/七座市场。

资料来源：长城汽车官网，海通国际

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传统自主品牌：加快向新能源赛道切换

- 新能源车型矩阵加速扩张：3月吉利总销量为11.0万辆，自中新能源车销量为2.8万辆，同比增长超98%，占总销量约25.5%；长城3月总销量为9.0万辆，其中新能源车销量1.3万辆，环比增长57.7%，占总销量约14.6%。凭借着多品牌战略，与吉利超级电混、长城柠檬-DHT、Hi4-T等混动技术平台的成熟，吉利与长城新能源车型矩阵得到快速扩张，特别是混动车型。
- 本次上海车展，长城共展出超15款新能源车型，包括坦克400PHEV、魏牌高山DHT-PHEV、哈弗二代大狗PHEV、山海炮PHEV等混动车型及2023款芭蕾猫、2023款好猫GT等纯电车型。吉利也同样携带了21款新能源产品阵容列阵登场上海车展：极氪X、吉利银河L7、领克08、睿蓝7在本次车展首次亮相。我们认为，2023年吉利与长城的新能源转型将持续提速，车型矩阵的快速扩张将助力新能源销量增长，其新能源市场占比将有望得到提升。

智己

•智己LS7定位智能纯电中大型SUV，2月10号正式上市，售价区间为30.98-45.98万元。座舱方面，LS7拥有106度IMAX超大视野，多维可变空间布局，搭载24扬声器音响系统。动力及驾控方面，双电机版最大功率425kw，百公里加速时间快可达4.5秒，后驱版最大CLTC续航里程为660km，配备全明星底盘硬件阵容。智能化方面，LS7搭载了双激光雷达、英伟达OrinX超高算力智驾芯片，可实现高阶辅助驾驶功能。

飞凡

•飞凡F7于3月27日正式上市，定位中大型豪华纯电轿车，售价22.99-30.19万元。动力方面，双电机版能达到最快3.7秒百公里加速性能，搭载全明星底盘阵容。座舱方面，F7配备巴赫座舱，搭载RISING MAX 3+1前后巨幕，拥有行业首创的双向双区独立影院场景，采用飞凡巴赫3D矢量音效技术。智能驾驶方面，F7配备RISING PILOT全融合高阶智驾系统，整车32个感知硬件，采用国内首创FULL FUSION全融合算法。

图：智己LS7



资料来源：公司官网，海通国际

图：飞凡F7亮相2023上海车展



资料来源：懂车帝，海通国际

埃安昊铂Hyper GT：定位中大型纯电轿车、售价21.99万-33.99万元，预计2023年10月开始交付。动力方面，搭载最大250kW功率单电机，峰值扭矩434N·m，百公里加速时间为4.9秒，支持480kW超快充以及换电功能。驾控方面，Hyper GT配备AICS智能底盘技术，转弯半径<5.3米；VDC2.0技术使信号传递时间降低到了7-8毫秒。智能驾驶方面，Hyper GT应用了风云三号红外遥感技术+3颗第二代可变焦激光雷达，进一步覆盖极端场景。

广汽传祺E9：定位混动智电MPV，售价33-39万元。动力系统方面，将搭载2.0TM发动机+GMC400混动专用变速箱组成的插电混动系统，0-100km/h加速8.6s，纯电cltc续航超100km，最长cltc续航里程超1000km。座舱方面，配备了12.3英寸组合仪表+14.6英寸悬浮式中控屏，雅马哈头枕音响等。在安全配置上，新车带有记忆泊车功能、首个车内生命体征检测系统，以及后风窗气囊等。

图：埃安Hyper GT亮相上海车展



资料来源：懂车帝，海通国际

图：广汽传祺E9亮相上海车展



资料来源：新浪汽车，海通国际

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国际品牌：劳斯莱斯闪灵迈向纯电第一步

- 车展中国首发，定位超豪华电动超级轿跑车，起售价为575万元，预计交付时间为2023年第四季度末。搭载前后双电机，综合最大功率430kW，峰值扭矩900N·m，CLTC工况续航里程585公里，0-100km/h加速4.5秒。座舱系统方面，配备Starlight Doors，搭载了全面焕新设计的SPIRIT奢华数字架构及劳斯莱斯Whispers互联服务。智能化方面，闪灵基于劳斯莱斯全铝“奢华架构”3.0打造，拥有超强计算与数据处理能力，内置共14.12万组收发装置，设计了额外的可变量子功能。
- 闪灵为劳斯莱斯首款纯电产品，也标志着超豪华品牌迈向纯电的第一步。

图：劳斯莱斯闪灵亮相上海车展



资料来源：凤凰网，海通国际

图：劳斯莱斯闪灵内饰



资料来源：汽车之家，海通国际

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Summary

- Domestic NEV players are launching new models or pure electric strategies, while traditional automakers showcased their NEV fleets to demonstrate determination. At the Auto Show, over 150 new models are on display, with NEVs accounting for 2/3, further squeezing the market share of ICEs.
- High spotlights on Yangwang, NIO, and Zeekr etc., while German and Japanese JV brands get less attentions.
- Automakers that mainly focus on PHEV or EREV technology are shifting to BEVs, generally introducing models with a long comprehensive range of over 600km.
- Frameless car doors, electric suction doors, multi-level electric seat adjustments, HUDs, and other luxury features are becoming more common in mass market.
- Domestic automakers like Zeekr and Neta announce their entry into the European market, accelerating the overseas expansion of new energy vehicles.
- ADAS becomes the main battleground for automakers' intelligent development. There is little mention of L4, while gradually returning to a rational focus on landing scenarios. L2-3 intelligent driving solution competitions become more intense.
- The boundaries between automakers and suppliers are gradually being broken, with the automotive industry chain division of labor transitioning from the OEM, Tier1, and Tier2 hierarchical structure to an ecosystem structure.
- Domestic LiDAR manufacturers are outperforming overseas manufacturers in terms of installations. RoboSense captures more than half shares to manifest a first-mover advantage, with the scale effect starting to show.

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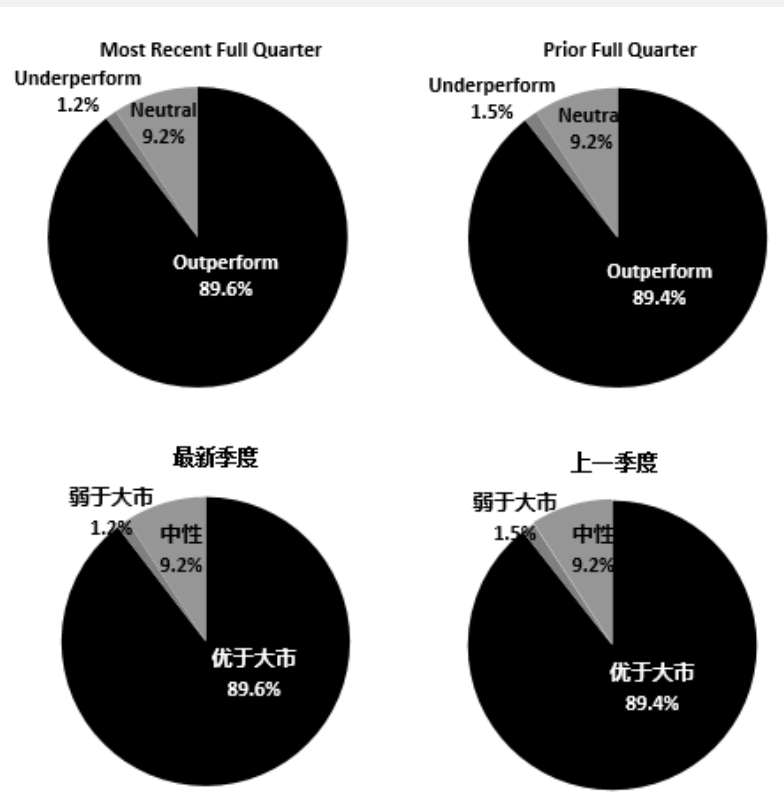
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