

2023 广州国际车展点评： 新能源汽车景气延续 广州车展新品齐上市

2023 Guangzhou International Auto Show: New energy vehicle boom continues, new products launched at Guangzhou Auto Show

Barney Yao barney.sq.yao@htisec.com

Oscar Wang sy.wang@htisec.com

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1. 2023广州车展核心要点

2. 车企新车预览

- 此次车展共有1132辆车参展，新能源车型占比接近一半，达到469辆。
- 传统车企自主品牌活跃，纷纷推出新能源子品牌，打响品牌战略战，价格策略激进。
- 新势力车企尝试品牌向上措施，豪华电动赛道竞争逐步激烈；传统欧洲豪华品牌依然坚持油电并行。
- 各家车企通过扩大产品矩阵拓展市场，为业绩增长打造全新支撑点：
 - 纯电MPV成车展C位，电动化技术赋能豪华MPV生产，此细分市场成为各家车企竞相追逐的新蓝海。
 - 新能源越野车型需求从小众走进大众，多款硬派纯电越野车同台竞技。
- 800V、智能座舱、高阶智能驾驶几乎成为各款新车型标配。
- 车企逐渐放缓甚至停止降价步调，策略大方面转向提升性价比，通过推出改款车型调整定价策略。
- 智能转型再加速，智能网联化趋势成新能源车企竞争高地，智能座舱AI算力提升为竞争中心。

- 自主传统品牌:

比亚迪海狮07 EV、极氪007、极越01、领克07、零跑C10、吉利银河E8、沃尔沃EM90、方程豹豹5、长城坦克700 Hi4-T、奇瑞iCAR 03、猛士917

- 新势力品牌:

理想MEGA、小鹏X9、问界M9、智界S7

自主品牌：小鹏X9

- 大七座纯电MPV，扶摇架构旗舰车型，预售价38.8万起，2024年1月开启交付
- 动力与驾控系统：轴距3160mm，搭载的前永磁同步电机最大功率为235kW，后感应异步电机最大功率为235kW，为全球唯一标配后轮转向的MPV，实现更小的转弯半径，操控表现更为灵活；内置84.5kWh于101.5kWh电池组，提供四驱/两驱版可选，续航里程在CLTC标准下分别为610/640/702km。后轮转向10.8m
- 座舱系统：首款搭载XOS天玑智能座舱系统的旗舰车型，系统首发搭载高通骁龙8295芯片，在视觉、动效、交互效率上大幅提升，并将支持多屏多任务、XDock、全场景车感SR等功能。小鹏推出AI小P全新形象，并接入GPT灵犀大模型，实现对环境及对话上下文更好的理解
- 智能驾驶：XEEA 3.5电子电气架构为首个驾舱融合的车载计算中心，集成自驾、座舱、仪表、网关、IMU、功放等，性能提升50%，成本减少40%，开辟通用人工智能融合自动驾驶新时代

图：小鹏X9外观



资料来源：小鹏科技日，海通国际

图：小鹏X9内部空间



资料来源：公司官网，海通国际

自主品牌：理想MEGA

- 公司首款纯电动车，定位家庭科技旗舰MPV，预计售价60万元内
- 动力与驾控系统：风阻系数0.215Cd，MPV全球最低；搭载前 155kW 驱动电机和后 245kW 的驱动电机，系统功率为 400kW ， 0-100km/h 加速时间为 5.5s；提供700公里CLTC续航，配合800V高压快充技术，结合与宁德时代合作的麒麟5C电池，预计可实现充电12分钟、续航500公里。
- 座舱系统：前排双联屏升级为第四代三星OLED屏幕，二排彩电尺寸升级到17寸
- 智能驾驶：首次搭载Mind GPT，有望实现城市+高速+泊车的智能驾驶能力

图：理想MEGA亮相广州车展



资料来源：新出行，海通国际

图：理想MEGA内饰



资料来源：公司官网，海通国际

自主品牌：极氪007

- 定位中型纯电动豪华车型，预售价**22.99**万元起，权益后**22.49**万元
- 动力与驾控系统：基于浩瀚架构下的**PMA2+**架构打造，将搭载**800V**电气架构、碳化硅后电机**310**千瓦，麒麟电池、后驱车型零百加速**5.4**秒，四驱实测**3.1**秒，按照特斯拉标准为**2.84**秒，入门CLTC续航**688**公里，**827**站快充，**380+**极充，**2220**超快充车位，保有量行业第一，行业最多**800V**超快充，**5**分钟**240**公里，**15**分钟**610**公里，
- 座舱系统：配备了**90**英寸一体式智慧灯幕，高通骁龙**8295**芯片，
- 智能驾驶：搭载**3**颗激光雷达，骁龙**8295**芯片，基于**OrinX**算力平台，极氪**007**配备了吉利全栈自研的智能驾驶辅助系统**KR GPT**，交付即开通**NZP**高速自主领航辅助系统

图：极氪007外观



资料来源：汽车之家，海通国际

图：极氪007内饰



资料来源：汽车之家，海通国际

自主品牌：极越01

- 定位纯电动中大型SUV，诞生于SEA浩瀚架构，预售价24.99万元起
- 动力与驾控系统：单/双电机版最大功率200kW/400kW，峰值扭矩343/686N·m，双电机零百加速时长为3.8s。单电机+71.4kWh磷酸铁锂电池CLTC综合工况续航里程550km；单电机+100kWh三元锂电池满电CLTC综合工况续航里程720km；双电机+100kWh三元锂电池满电CLTC综合工况续航里程660km；
- 座舱系统：新增B站、小宇宙等应用服务，以及Switch投屏支持，配合35.6英寸6K无界一体屏和高通8295高算力芯片；融合百度地图AI能力，明年地图大模型首次上车，车道级导航全国全覆盖，地图称为AI向导，多级菜单一步直达，百度/Apollo大模型全面生态赋能
- 智能驾驶：BEV+transformer纯视觉方案全标配全免费，再通过OTA升级更新OCC占用网络技术；辅助领航PPA已在上海，深圳/杭州完成开通，明年超过200城市开通PPA；高阶智驾ROBO Drive Max支持一次性买断、按月支付，逐步开放按日订阅

图：极越01汽车机器人亮相广州车展



资料来源：易车，海通国际

图：极越01内饰



资料来源：易车，海通国际

自主品牌：零跑C10

- 首款全球化产品，中级SUV，基于LEAP3.0技术，预计售价15万起
- 动力与驾控系统：配备四叶草中央集成式电子电气架构、CTC 2.0电池底盘一体化技术、高性能油冷电驱，整车扭转刚度高达42500N.m/deg
- 座舱系统：首批搭载高通骁龙8295芯片，通过语音识别、多模态交互、舱泊一体等功能带来更加极致的体验
- 智能驾驶：标准版车型利用8295芯片实现了智舱和L2级辅助驾驶的需求，高配版车型上，增加的英伟达OrinX芯片和激光雷达进一步提升车辆的智能驾驶能力，在高速和城市道路上实现NAP功能

图：零跑C10外观



资料来源：公司官网，海通国际

图：零跑C10内饰



资料来源：公司官网，海通国际

自主品牌：比亚迪海狮07 EV

- 中型都市智电SUV，e平台3.0进阶之作，预计价格区间20-26万元
- 外观设计由知名汽车设计师沃尔夫冈·艾格领导的团队打造，融入了Ocean X概念车的设计元素。车身低趴的造型搭配溜背式设计，展现强烈运动感。
- 动力与驾控系统：开创性的CTB电池车身一体化技术，搭载后驱/四驱动力架构、iTAC技术，采用前双叉臂、后五连杆独立悬架，并配备云辇C智能阻尼车身控制系统
- 智能驾驶：比亚迪最新智能驾驶系统

图：海狮07 EV外观



资料来源:公司官网, 海通国际

图：海狮07 EV前脸设计



资料来源: 公司官网, 海通国际

自主品牌：沃尔沃EM90

- 车厂首款纯电MPV，极氪009衍生车型，预售价81.8万人民币，预计2024年3月交付
- 动力与驾控系统：电池容量为116kWh，采用后轴单马达配置，最大动力输出为200kW（约268匹马力），零百加速8.3秒，CLTC测试下最高续航可达738公里
- 座舱系统：配备10.25英寸数码仪表盘、15.4英寸中控屏幕和15.6英寸后排触控智慧面板，前座减少实体键，后排屏幕支援多功能操作，可折叠并支援娱乐和视音功能，并可通过语音或轻触萤幕切换剧院模式。车辆还配置远端操控、OTA远端更新和V2L对外供电功能
- 智能驾驶：搭载世界树智能安全体系，辅助驾驶系统配置7个高画质摄影镜头、1个毫米波雷达、12个超声波雷达和车内1个摄影镜头

图：沃尔沃EM90外观



资料来源：公司官网，海通国际

图：沃尔沃EM90内饰



资料来源：公司官网，海通国际

自主品牌：问界M9

- 全新D级豪华SUV平台，定位全景智慧旗舰SUV，正式上市时间12月，售价50-60万
- 动力与驾控系统：全系标配四驱系统，涵盖增程和纯电两种动力形式，双电机驱动，峰值功率165kW（前）、200kW（后），额定功率42kW（前）、72kW（后）；宁德时代提供的三元锂电池组、HUAWEI DriveONE电驱智能平台加持下，整车百公里能耗6.9L/100km，百公里电耗24.3KWh/100km；采用全铝合金底盘，全系标配空气弹簧及CDC减震系统，配合HUAWEI DATS 2.0等独特技术
- 座舱系统：搭载HarmonyOS 4鸿蒙智能座舱，率先搭载华为百万像素智慧大灯，配备星光数字矩阵交互系统，施罗德散射声学技术首次上车，水晶设计、情感可视交互、AI大模型助力
- 智能驾驶：搭载华为AR-HUD、华为ADAS2.0

图：问界M9亮相广州车展



资料来源：盖世汽车资讯，海通国际

图：问界M9整车外观



资料来源：公司官网，海通国际

自主品牌：智界S7

- 和奇瑞合作的首款轿车车型，售价从25.8万起
- 动力与驾控系统：电机最高效率可达98%，双电机版本可达3.3秒百公里加速。配置宁德时代定制款支持800V高压碳化硅动力平台的电池，电池容量为100kWh，最高CLTC续航里程突破800公里。风阻系数低至0.203，12.4kWh百公里综合工况电耗更为省电，并实现5分钟内补能超200km，15分钟补能400+km
- 座舱系统：搭载鸿蒙座舱+Harmony 4.0系统，拥有更多可以关联打通的终端，配备12.3英寸前眺领航屏，并有六音区声源定位、多人多屏多音区并发控制、舱内眼球位置追踪及眼部状态识别、多屏多通道双向流转、多屏跨设备投屏等功能，并丰富应用选择
- 智能驾驶：智驾系统为华为ADS 2.0，具备全国可用、不依赖高精地图的L2高阶智能驾驶功能，仍保留激光雷达，具备高速导航辅助驾驶并首发无人代客泊车功能

图：智界S7外形



资料来源：公司公众号，海通国际

图：智界S7内饰



资料来源：公司公众号，海通国际

自主品牌：阿维塔12

- 定位，全国建议零售价**30.08**万起
- 动力与驾控系统：支持高压快充，充电**10**分钟行驶**400km**，单电机和双电机两个版本可选，综合续航里程最高可达**700km**
- 座舱系统：搭载基于Harmony OS 4开发的鸿蒙座舱
- 华为高阶智能驾驶系统ADS2.0：全系标配 **29** 颗智驾传感器，包含 **3** 颗隐藏式激光雷达，厘米级测距精度，业界首创激光雷达融合 GOD 网络，涵盖城区车道巡航辅助（City LCC）及高速/城区智驾领航辅助（Highway/City NCA），不依赖高精地图；支持**APA** 智能泊车辅助、**RPA** 遥控泊车辅助及**AVP** 代客泊车辅助

图：阿维塔12



资料来源:公司官网，海通国际

图：内饰



资料来源: 易车，海通国际

自主品牌：吉利银河E8

- 首款纯电，定位中大型纯电轿车，预售价
- 动力与驾控系统：基于吉利SEA浩瀚纯电架构打造，轴距达到2925毫米，800V极速快充、高性能sic碳化硅电驱、高性能四驱、四轮独立悬架等旗舰级性能配置，拥有3.49秒零百加速、210km/h最高时速、5.62m同级最小转弯半径的极致表现，配合星睿智算中心“虚实结合”的操稳平顺性调教体系
- 座舱系统：量产最宽、最薄、清晰度最高的45英寸8K无界智慧霸屏，搭载AI算力达30TOPS的高通骁龙8295芯片，全场景AI智能语音交互0.23s即可极速响应，全场景免唤醒
- 智能驾驶：新车可以选装车顶激光雷达，公司量产车中首个装备激光雷达的车型，预示新车将具备更高阶的智能驾驶辅助能力

图：银河E8外观



资料来源：公司官网，海通国际

图：银河E8内饰



资料来源：公司官网，海通国际

自主品牌：方程豹豹5

- 定位超级混动硬派SUV，指导价28.98—35.28万元
- 动力及驾控系统：搭载云辇-P标准版智能液压车身控制系统，及DMO超级混动越野平台，演化CTC电池底盘一体化技术，采用非承载式车身，配有三把差速锁，搭载纵置布局EHS，1.5T发动机+前后双电机组成，系统总功率505kW，总扭矩760N·m，0-100km/h加速为4.8秒后桥电机达到285kW，综合续航达1200公里，可实现45度角爬坡。
- 智能座舱：Filink智能座舱依托开放式生态，对齐手机体验；车内50英寸AR-HUD、中空屏与流媒体后视镜全面打通，实现五屏互联；配备四音区智能语音控制系统、及与帝瓦雷音响合作打造的专属音乐座舱

图：方程豹豹5亮相广州车展



资料来源：易车，海通国际

图：方程豹豹5内饰



资料来源：腾讯，海通国际

自主品牌：长城坦克700 Hi4-T

- 定位硬派越野SUV，首批限量70台，预售价70万元，55秒首发全部售罄
- 动力与驾控系统：非承载式车身纵梁部分采用大截面梯型车架结构，高强度钢占比达到99%，具有245mm离地间隙；大排量混动架构3.0T Hi4-T。Hi4-T搭载3.0T+9HAT黄金动力总成，3.0T V6双涡轮增压发动机，匹配P2电机，动力性能比肩V8发动机，综合功率达到385kW，扭矩高达850N·m。在Hi4-T加持下，首发限定版在燃动状态下百公里加速在5秒级，配合带Mlock机械锁止的新一代智能四驱系统、245mm超高离地间隙、多模式全地形系统，实现豪华与越野兼具体验。配备豪华空气悬架提供多档升高选择，以及CDC电磁减振器系统

图：长城坦克700 Hi4-T 亮相广州车展



资料来源：新浪科技，海通国际

图：长城坦克700 Hi4-T 车架及底盘



资料来源：新浪科技，海通国际

自主品牌：奇瑞iCAR 03

- iCAR品牌首款车型，都市纯电硬派小型SUV，售价两驱版14-16万元，四驱版16-19万元
- 动力与驾控系统：纯电版续航里程超700km，增程版（等同于2.5TGDI动力的智能自适应电动四驱）搭载单电机，最大功率135kW，综合续航超1000km。太阳能充电功能加上停车时外接拓展，预计在全年提供额外9000km续航。
- 智能座舱：简化大量实体按键，三幅方向盘造型，配备超大中控屏幕及前排手机无线充电功能、i-VA生态智能车控系统，支持3D数智人、情感化、实时监控保护用车安全；驾驶按钮可开启10种驾驶模式。
- 智能驾驶：L2+级辅助驾驶功能。

图：奇瑞iCAR 03外观



资料来源：网易，海通国际

图：奇瑞iCAR03内饰



资料来源：网易，海通国际

自主品牌： 猛士917

- 旗下首款中大型豪华电动越野车，63.77万元起售
- 动力与驾控系统：搭载猛士越野平台MORA、猛士动力MEGA POWER以及猛士全地形系统M ATS；纯电版采用四电机，最大输出功率达到 800kW，峰值扭矩 1400N·m，轮边扭矩超过 16000N·m，百公里加速4.2秒；增程版采用三电机布局，纯电续航可达到156公里，综合续航可达到825公里。
- 座舱系统：搭载高通8155高算力平台，构建“全液晶仪表盘、中控屏、副驾屏、后排屏、HUD”五屏多元互动系统，实现了5G远程智联、蓝牙钥匙、车辆状态监测、遥控泊车等功能
- 智能驾驶：L3智能驾驶辅助系统，支持高速、高架自动驾驶领航、城区自动驾驶领航等；并将搭载无人机伴飞、反向充电、代客泊车、蟹行模式等技术

图：猛士917亮相广州车展



资料来源：腾讯，海通国际

图：猛士917内饰



资料来源：腾讯，海通国际

Summary

- A total of 1,132 vehicles were exhibited at this auto show, of which new energy models accounted for nearly half, reaching 469 vehicles.
- Traditional car companies have been actively establishing independent NEV sub-brands, the intensified strategic brand wars incurs radical price strategies.
- NEV companies are trying to improve their brands, and competition in the luxury electric field is gradually becoming fiercer; traditional European luxury brands still insist on running hybrid models.
- Various car companies are expanding their markets by expanding their product matrix to create new support points for performance growth:
 - Pure electric MPVs became the spotlight at the auto show, and electrification technology empowers the production of luxury MPVs. This market segment has become a new blue ocean that various car companies are chasing.
 - The demand for new energy off-road vehicles has moved from the niche to the masses, and many hard-core pure electric off-road vehicles are competing on the same stage.
- 800V, smart cabin, and advanced autonomous driving have become standard features of almost every new model.
- Car companies have gradually slowed down or even stopped cutting prices, and their strategies have generally shifted to improving cost performance and adjusting pricing strategies by launching facelifted models.
- Intelligent transformation is accelerating again, the trend of intelligent networking has become a competitive highland for new energy vehicle companies, and the AI computing power of smart cockpits has become the center of competition.

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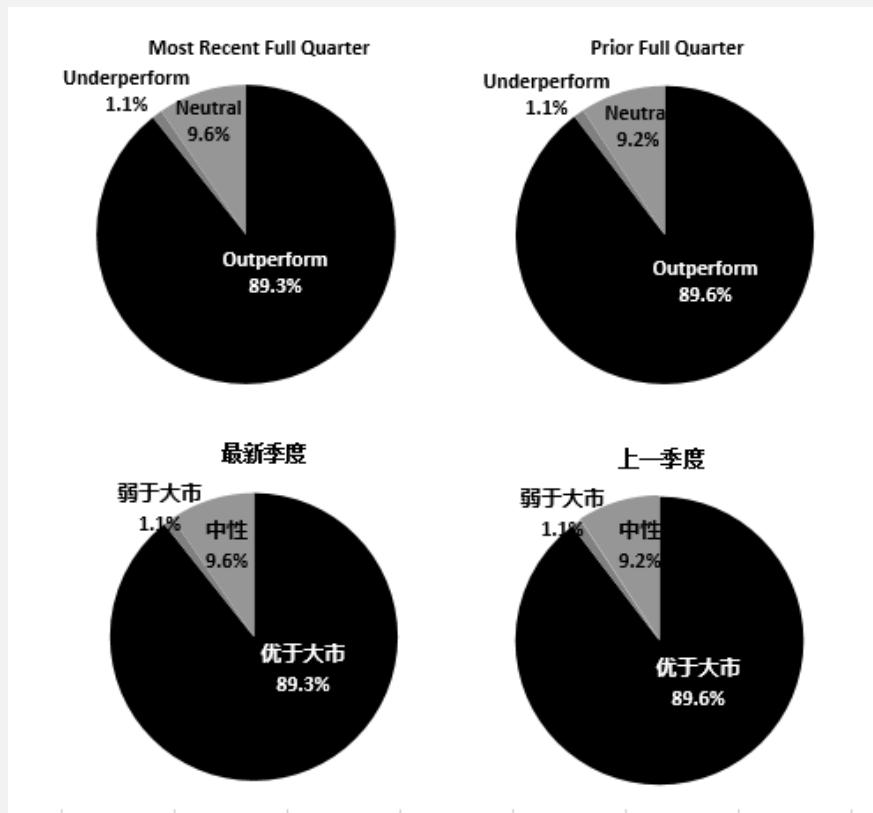
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SEBI 研究分析师注册号: INH000002590

地址: 1203A, Floor 12A, Tower 2A, One World Center

841 Senapati Bapat Marg, Elphinstone Road, Mumbai 400 013, India

CIN U74140MH2011FTC224070

电话: +91 22 43156800 传真: +91 22 24216327

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SEBI Research Analyst Registration Number: INH000002590

APPENDIX 2

Address : 1203A, Floor 12A, Tower 2A, One World Center

841 Senapati Bapat Marg, Elphinstone Road, Mumbai 400 013, India

CIN U74140MH2011FTC224070

Ph: +91 22 43156800 Fax:+91 22 24216327

Details of the Compliance Officer and Grievance Officer : Prasanna Chandwaskar : Ph: +91 22 43156803; Email id: prasanna.chandwaskar@htisec.com

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