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Passenger Car Intelligent Chassis Controller and Chassis Domain Controller Research Report, 2024

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According to incomplete statistics from ResearchInChina, dozens of financing cases have been completed in the field of intelligent chassis in 2024, with the financing amount exceeding RMB3 billion.

Intelligent Chassis Financing Cases (Incomplete Statistics), Jan-Sep 2024

Investee	Time	Amount	Main Business of Investee	Investor
Trugo Tech	Jan. 2024	/	Chassis-by-Wire	Blue Lake Capital, etc.
Watson Rally	Jul. 2024	Tens of millions of yuan	EMB	Blue Lake Capital led the investment, joined by Hibang Fenhua and Pudong Venture Capital. The existing shareholder Cherish Capital continued to invest.
LeeKr Technology	Jun. 2024	RMB1+ bn	Chassis-by-Wire	Hangzhou Fuchun Bay New City Development Fund, Saize Capital, Hefei Construction Investment, etc. jointly participated in the investment
GMT	May 2024	RMB400+ mln	Chassis-by-Wire test	Vision Plus Capital led the investment, followed by Changxing Economic Development and others. Orient Renaissance Capital, HBVC and other existing investors added their investment.
Upon Technology	Apr. 2024	Nearly RMB100 mln	Chassis-by-Wire	In the seed round, Landstone Capital led the investment, followed by Crystal Stream, W&W Capital and so on. In the angel round, Xiaomi Strategic Investment led the investment, followed by Beijing Shunwei Venture Capital and the existing shareholder Landstone Capital
Central Cloud Intelligent Vehicle	Apr. 2024	/	Chassis-by-Wire	Zhongke Innovation
	Mar. 2024			Soaring Capital, Suzhou Selaginella Digital Technology Co., Ltd.
Edge Rock	Mar. 2024	RMB100 mln	Brake-by-wire	Highlight Capital, Xianghe Capital and Gree Industrial Investment
GoodGrid	Mar. 2024	Tens of millions of yuan	Chassis control	Shenzhen-Hong Kong Stock Connect Capital and Changshu Economic Development Holdings Co., Ltd.
Coordinate system	Mar. 2024	RMB50 mln	EMB	Northern Light Venture Capital led the investment
Global Technology	Feb. 2024	/	Chassis-by-Wire	Chongqing Yufu Group Co., Ltd. led the investment, followed by well-known investors such as Xuhui Capital and Shijia Wenhua.
	Apr. 2023	Nearly RMB400 mln	Chassis-by-Wire	CICC, Shenzhen Investment Holdings Co., Ltd., Guosen Securities, and TSARI Capital led this round of investment, and existing shareholders continued to invest.
Bebest	Jan. 2024	RMB200+ mln	Chassis-by-Wire	Meridian Capital and Orinno Capital jointly led the investment, followed by Fengfan Venture Capital, Shanghai Science and Technology Innovation Fund, and Baolong Technology. The existing shareholder Sequoia China continued to invest.
Trinova	Jan. 2024	Nearly RMB600 mln	Chassis-by-Wire	Guojiang Fund (invested by JAC), BAIC Capital, Smart Vehicle Fund (Shaanqi), CFI Capital and other industry funds jointly led the investment.

Source: ResearchInChina

Progress of Trugo Tech's EMB Products

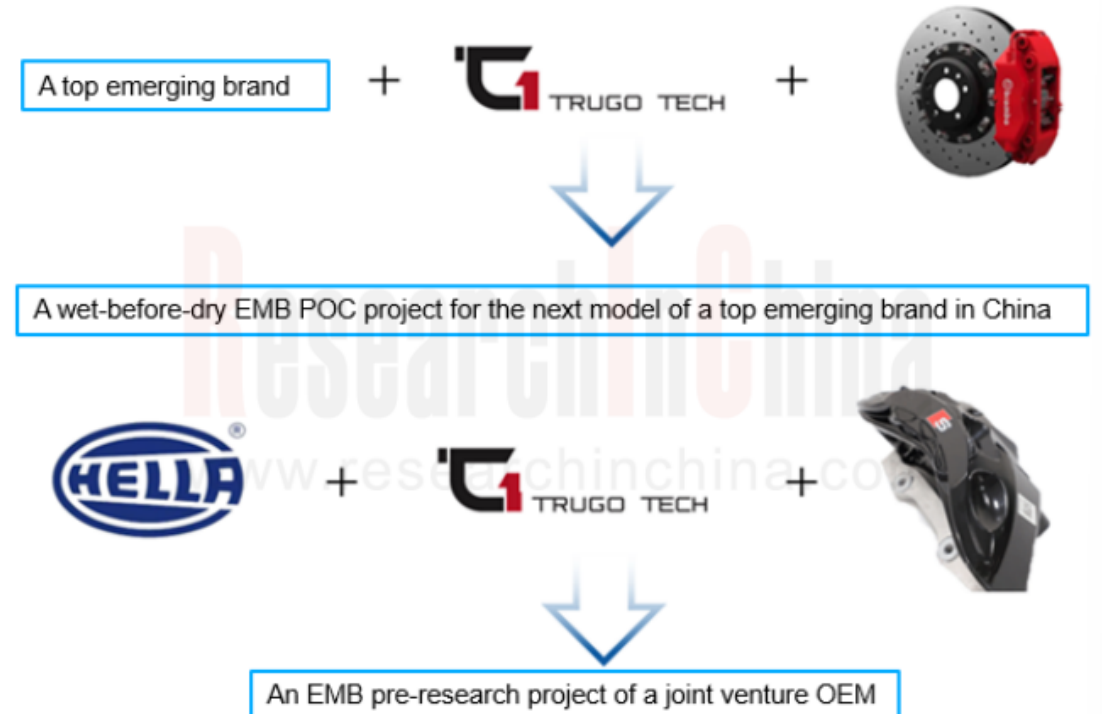
For example, Trugo Tech closed a Series B funding round in January 2024, only 6 months away from its A++ funding round, thanks to the capital market's sustained attention to intelligent chassis and Trugo Tech's own technical strength.

It is known that Trugo Tech has supplied over 80,000 ESC products monthly. Based on the mature development experience of ESC, Trugo Tech has deployed EHB and EMB products.

EHB. The product adopts the One-Box technology route and can be matched with <3.2t vehicle models. It integrates more than 30 intelligent functions such as power assist control, coordinated braking energy recovery, wheel anti-lock control and body stability control, and supports multi-sensor fusion. It features pressure build-up in less than 150ms, and the maximum pressure build-up greater than 180bar, and can recover over 90% of energy.

EMB. Starting from actuators and core algorithms, Trugo Tech has started pre-research on dry EMB products and related solutions, providing full dry EMB POC projects for the models to be released by domestic leading emerging OEMs. The EMB products are expected to land on vehicles for testing in 2024, and come into small volume production in 2026.

Progress of Trugo Tech's EMB Products



Source: Trugo Tech

From the perspective of OEMs, some have expanded multiple chassis functions

NIO 4D Comfort Pilot + Adaptive Suspension Predictive Control Solution

As the first OEM in the industry to install chassis domain controllers on cars, NIO released the Banyan 2.4.0 via OTA in January 2024, adding 4D Comfort Pilot (the horizontal, vertical and longitudinal axes of the body and the time dimension). NIO claims that it is "the industry's first intelligent chassis system powered by AI technology". Enabling the functions is inseparable from NIO's intelligent chassis hardware system composed of intelligent chassis controller (ICC), air spring and continuous damping control system (CDC).

4D Comfort Pilot means that the vehicle generates road surface features in advance according to the intelligent driving hardware on the body, and then through real-time or offline big data processing, the features are finally fed back to the chassis domain to adjust the suspension height and damping control strategy in real time to improve driving comfort. The navigation layer of 4D Comfort Pilot can be generated as long as four NIO cars (equipped with air springs + CDC) pass by on a road section. Subsequent NIO cars passing through this road section can confirm the bumpy layer and achieve real-time updates.

Geely's AI digital chassis supports such functions as crab walk mode, tank turn and super magic carpet.

In April 2024, Geely released an AI digital chassis based on the GEA. The self-developed chassis integrates domain controllers and is equipped with steer-by-wire, brake-by-wire, active suspension and four-wheel motor system, supporting three-way (XYZ), six-degree-of-freedom intelligent decision. Supported by the above hardware and Geely's AI algorithm control system, the AI ??digital chassis can enable the following intelligent chassis functions:

Crab walk mode (front and rear wheels roll in the same direction)

Tank turn

Super magic carpet (active suspension adjustment)

"Zero" impact when passing over bumps (real-time perception of road information; tire height adjusted by the suspension actively)

Automatic adjustment for wading (the front suspension is automatically lifted before wading, and the suspension height is adjusted in real time during wading)

Side active defense (when there is a risk of a side collision, one side of the body will quickly rise to reduce the damage caused by the collision)

Geely's AI digital chassis makes a reaction in just 4 milliseconds (25 times faster than the human extreme reaction), enabling "automatic vehicle control for risk avoidance" in extreme conditions. It is known that Geely's AI digital chassis will be mass-produced and installed in Geely Galaxy, Lynk & Co and other products by 2025 at the latest.

Main Types of Players in China that are Developing Chassis Domain Controllers

In research and development of cooperative intelligent chassis controllers, foreign players benefit from their technical expertise and first-mover advantages in traditional automobiles. Some foreign suppliers already have some mature products, such as Bosch's integrated vehicle dynamic control system and ZF's cubiX chassis integrated controller. Chinese parts suppliers have started R&D of cooperative intelligent chassis controllers since 2000, and quickened their pace in recent years, gradually narrowing the gap with international giants.

Currently, there are three main types of players in China that are developing chassis domain controllers:

- First, companies that focus on chassis domain controllers, such as MXD. They can provide full-stack services from hardware platforms to application layer, but they have a short history and limited development capital reserve.
- Second, Chinese chassis suppliers that deploy one or more components for brake-by-wire, steer-by-wire or suspension-by-wire. They have mature chassis development experience and have initially achieved mass production of actuators. Representatives including Global Technology, Tongyu Automobile and Trinova often have profound technical expertise in a single actuator, but still face obstacles in horizontal expansion for domain control solutions.
- Third, traditional automotive electronics companies represented by Jingwei Hirain. They often have mature development experience in domain controllers. For example, Jingwei Hirain has deployed products in the body domain, driving domain, and chassis domain, and participated in the R&D and supply of chassis domain controllers for NIO, with certain mass production experience.

MXD

In April 2024, MXD debuted at the Auto China with VCC 1.0, its first-generation Lingkong Series chassis domain controller which integrates CDC, ECAS, EPB and onboard IMU and realizes the function of dual-control EPB through the EPB module. It is known that VCC 1.0 has been designated by JAC.

In July 2024, MXD announced that it would integrate its self-developed rear wheel steering control on the first-generation chassis domain controller, providing the market with VCC 1.5, a new chassis controller with software and hardware decoupled.

Tongyu Automotive

In July 2024, Mr. Shu Qiang, founder, chairman and general manager, said that Tongyu Automotive had released its first-generation chassis domain controller which can enable integrate control of braking, steering, suspension, parking, driving and other systems, and decouple the high-level functional algorithms related to vehicle dynamic performance in the original components (VDC, TCS, etc.) from the braking system and place them in the chassis domain controller instead. In addition, the solution supports dual MCU redundancy and integrates a combined positioning module. The two MCUs and CAN form vehicle architecture ring network redundancy. In terms of hardware redundancy, key power supplies, sensors, actuators, and communications are redundant.

As early as March 2024, Tongyu Automotive formed a partnership with C*Core Technology. They will create a localized automotive electronic chassis-by-wire controller solution.

CDCU of Tongyu Automotive



Source: Tongyu Automotive

Jingwei Hirain

In June 2022, NIO announced China's first full-stack self-developed suspension control system equipped with a full-stack self-developed intelligent chassis controller (ICC). It was first available to the production vehicle ET7. Jingwei Hirain participated in the R&D and production of this domain controller.

In February 2024, Jingwei Hirain started mass production of its full-stack self-developed chassis domain controller. So far, it has mass-produced controllers, underlying software, air springs, suspension algorithm modules, and realized functions such as welcoming and seeing off, active prediction, and magic carpet suspension. Jingwei Hirain's full-stack self-developed chassis domain controller has the following features:

It integrates damping control, air spring height control and other functions, and simplifies the chassis control system

It can also integrate rear wheel steering, electronic stabilizer bars, steering column position control, engine mounting, etc.

In the combination with intelligent actuators, the chassis domain controller with enough computing power reserved can integrate longitudinal, lateral and vertical control functions of vehicles, such as steering, braking and suspension to perform high-level cooperative chassis control and vehicle motion trajectory control.

Chassis Domain Controller of Jingwei Hirain



Source: Jingwei Hirain

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