



PRESS KIT

Valeo at the 2026 Beijing International Automotive Exhibition

Future of Intelligence

APRIL 24TH TO MAY 3RD, 2026

Booth #B2D01

Capital International Exhibition, Center of China (CIECC)

Valeo

Table of contents

Introduction:Decoding China’s Auto Market 2026	3
Highlights & Venue: Where to find us	5
Executive Interview: Turning “China Speed” into Sustainable Tech Power	6
Key Figures: The Chinese Automotive Industry in 2025	9
Market & Trends: 8 Key Shifts Shaping China’s Future	10
Section 1: Accelerating Electric Mobility at “China Speed”	
The Competitive Edge: Time-to-Market Excellence	13
Affordable & Scalable Electrification: Systems for All EV Needs	14
Valeo Power eSkateboard: A Unified Approach to Performance	14
The Flash Charging Revolution: Immersive Battery Cooling	15
Section 2: Shaping Autonomous and Connected Mobility	
Highway Navigation on Autopilot (NOA): High-End Automation for AI	18
The Brain Cocoon: Making the Invisible Visible	19
Valeo SCALA™ 3 Evo LiDAR	20
Centralized Intelligence: Solutions for Software-Defined Vehicles	20
Beyond Four Wheels: Advanced Solutions for Two-Wheelers	22
Section 3: Redefining Safety and Style in the SDV Era	
Exterior Lighting: Powering the Latest XPeng Vehicles	25
Pioneering Smart Visibility: From ADB to HD Pixel Projection	26
UHD Infotainment: The Colorful Partnership with Appotronics	27
Precision Cleaning: AquaBlade™ and LiDAR Cleaning Systems	28
Section 4: Expanding Mobility Beyond the Automotive World	
The Convergence of Tech: Bringing Valeo’s Expertise to Humanoids	31
Company overview	33
Press information	35

Decoding China's Auto Market 2026: From Volume Scaling to Technology Expansion

China is no longer just the world's largest automotive market; it has become the industry's global **"fitness center"** and its most rigorous laboratory. As **Auto China 2026 starts**, the market is undergoing a fundamental pivot: shifting from a decade of "Growth at All Costs" to a new era of **Technology Expansion**.

- **A Market of Extreme Speed and Concentration**

The scale remains staggering, with sales reaching **over 34 million units in 2025**, yet the landscape is tightening. While 183 brands compete for dominance, the market is now heavily concentrated, with the **top 5 OEMs commanding ~60% of the NEV sector in 2025**. For Valeo, this environment demands unprecedented agility: our ability to move from launch to **Start of Production (SOP) in just a few months** is no longer a bonus - it is the entry ticket to stay relevant in a market where product cycles are now measured in weeks, not years.

- **The NEV Dominance and the "SAE AD Levels"**

The transformation is structural. **New Energy Vehicles (NEVs)** now represent **50% of passenger car sales**, driven by a strategic coexistence of BEVs and PHEVs. But the frontier has moved: the battleground is now **Intelligent Architecture**. China is rapidly scaling **Robotaxi pilots across 15 cities** and moving toward cloud-edge architectures, paving a concrete pathway toward **L4 autonomy**.

- **From Domestic Oversupply to Global Leadership**

The 2026 landscape is defined by a new level of maturity and hyper-competition. This high-pressure environment acts as a catalyst for **efficiency, pushing the boundaries of cost-competitiveness and rapid innovation**. As the market consolidates, the focus has shifted from more volume to high-value, tech-first solutions. China has rapidly shifted from a net importer to a **global leader**, with automotive exports reaching nearly **over 7 million passenger vehicles in 2025**.

- **A New Regulatory and Consumer Paradigm**

The era of **unregulated rapid scaling** is giving way to a more **structured and transparent framework**. Simultaneously, Chinese consumers are refocusing on **quality of life**, with subsidies now prioritizing service-based consumption and smarter, safer mobility.

At Auto China 2026, Valeo is proud to showcase technologies that meet both demands: the **extreme competitiveness** required by local leaders and the **uncompromising innovation** demanded by new global standards. We are not just witnessing the future of mobility; we are building it here, at speed.

Valeo, a Strategic Partner for China's Fast-Moving Automotive Ecosystem

Valeo stands out as a trusted partner for both Chinese and global OEMs by combining cutting-edge innovation with unmatched industrial agility. The Group offers:

- **Accelerated innovation cycles**, enabling rapid development and deployment of new technologies.
- **Design-to-cost expertise**, ensuring high-value solutions across all vehicle segments.
- **Local-for-local approach**, with strong R&D and production footprint in China and the ability to support our Chinese customers in their overseas ambition.
- **Scalable solutions**, from entry-level ADAS to advanced Level 3 autonomy and above.

This unique positioning allows Valeo to anticipate market needs and deliver technologies at the pace required by Chinese OEMs.

VENUE

Where can you **find us** at **Auto China 2026?**

Valeo Booth #B2D01, Capital International Exhibition, Center of China (CIECC)



HIGHLIGHTS

Do not miss our **press events**

April 25

- 12:00 - 12:30
- **How we position perfectly in China Quality & Speed & Innovations**
 - With: **Song Zhou, Valeo China President & Jianmin Gu, Valeo China CTO**
 - Location: **Capital International Exhibition, Center of China (CIECC), Valeo Booth #B2D01**

“China: How Valeo Is Turning ‘China Speed’ into Sustainable Tech Power”

Jianmin Gu
Valeo China CTO



Two years ago, we spoke about China as a "fitness center." Today, as we open Auto China 2026, the market has shifted from "Rapid Volume Expansion" to "Radical Technology Expansion." How is Valeo leading in this more mature, hyper-competitive landscape?

The "fitness center" analogy perfectly captured the intense, high-speed development phase of the Chinese market. Today, as we enter the "Technology Expansion" phase, endurance, scale, and financial stability are just as important as speed. In this hyper-competitive landscape, automakers are streamlining their supply chains and partnering with Tier-1 suppliers who can guarantee both cutting-edge innovation and flawless industrialization. Valeo is leading this shift by leveraging our massive local footprint, which now includes 10 R&D centers and over 4,300 engineers dedicated to our "In China, for China" strategy.

To thrive in a consolidating market, cost-competitiveness and technological sovereignty are non-negotiable. We have drastically reduced our development cycles to match the 18-to-24-month (at vehicle level)

"China Speed" without compromising our stringent global safety standards. A prime example is our localized production of Silicon Carbide (SiC) inverters and deeply integrated power electronics. By manufacturing these critical components locally, we provide Chinese OEMs with more than 5% efficiency gain in their powertrains, directly translating to better range and lower battery costs.

Furthermore, consolidation means automakers are looking for scalable platforms rather than piecemeal components. Valeo is delivering fully integrated systems, such as our smart thermal management architectures, which reduce the number of individual parts by up to 30%. This integration lowers assembly costs and reduces vehicle weight, providing the exact kind of high-quality, high-margin solutions our partners need to survive the current price wars and expand their footprint both domestically and globally.

We are seeing new societal trends in China, the "Silver Economy", "Emotional Consumption", and a surge in "Outdoor Lifestyles". How is Valeo translating these human needs into technical solutions?

At Valeo, we believe mobility must adapt to the demographic and psychological shifts of its users. To address the "Silver Economy," we are deploying advanced interior sensing systems. By utilizing high-resolution infrared cameras and radar, our Driver Monitoring Systems (DMS) can track cognitive load, fatigue, and even vital signs. Coupled with our

Trained Parking and Automated Valet Parking (AVP) technologies - to be first launched in China with BMW, have been already equipped in over 15 million vehicles globally and highly localized for tight Chinese parking environments - we are drastically reducing the physical and mental stress of driving for older demographics, ensuring their mobility remain safe and accessible.

Regarding "Emotional Consumption," younger Chinese consumers view the vehicle as a "Third Living Space." We are answering this demand through our advanced lighting and interior experiences. Our high-resolution headlamps, featuring over 1.3 million pixels per unit, allow users to project personalized messages or graphics onto the road, turning the car into a medium for self-expression. Inside the cabin, we integrate dynamic ambient lighting, acoustic optimization, and smart scent dispensers that sync with the vehicle's driving mode to create immersive, mood-enhancing environments.

As China shifts from speed to technological excellence, our strength lies in combining breakthrough innovation, industrial mastery, and deep local roots to deliver smarter, more human-centric mobility.

The surge in "Outdoor Lifestyles" and camping has fundamentally changed how vehicles consume energy. We are supporting this trend through our industry-leading second-generation Smart Heat Pump technology. In winter camping scenarios, our heat pumps can extend Electric Vehicle (EV) battery range by up to 20% compared to traditional heaters, while our bidirectional On-Board Chargers (OBC) enable robust

Vehicle-to-Load (V2L) capabilities. To ensure safety in rugged environments, the Valeo AquaBlade™ integrates advanced defrost and debug functions, maintaining a clear field of vision with minimal fluid and energy consumption. Together, these innovations transform the EV from a simple transport mechanism into a reliable, high-performance mobile hub for any wilderness adventure.

Beyond hardware, China is the global frontrunner for the "Software-Defined Vehicle" (SDV). How is Valeo evolving from a traditional Tier-1 supplier into a strategic software and systems partner for Chinese automakers?

China is undeniably writing the playbook for the Software-Defined Vehicle, and Valeo has fundamentally restructured its business model to meet this reality. We are no longer just shipping "black box" hardware; we are providing decoupled software solutions through our dedicated software activity, Valeo anSWer. With a global force of around 9,000 software engineers - a significant and growing percentage of whom are based in our tech hubs in Wuhan, Shenzhen, and Shanghai - we are co-creating vehicle architectures directly with Chinese OEMs.

Our evolution into a strategic partner is defined by our mastery of zonal architecture and domain controllers. We provide the critical middleware that bridges the vehicle's operating system with its physical actuators. For instance, our advanced domain controllers can process data from up to 20 different sensors simultaneously, managing everything from automated driving features to predictive thermal management, and even user experiences for lighting and wiper. By offering an open, modular software stack, we allow Chinese automakers to plug in their proprietary user interfaces and infotainment systems while relying on Valeo's rigorously tested, ASIL-D certified software for safety-critical functions.

This decoupling also enables continuous Over-The-Air (OTA) updates. We are utilizing AI-driven algorithms to optimize energy consumption and refine ADAS solutions long after the vehicle has been sold. By providing Software-as-a-Product, Valeo empowers Chinese automakers to generate new post-sale revenue streams, cementing our role as a foundational partner in their digital transformation.

Looking toward 2028, China is rapidly scaling Robotaxis and exploring Embodied AI (Humanoids). How is Valeo preparing for this convergence of automotive and robotics?

The convergence of automotive technology and robotics is a natural progression for Valeo, as the foundational requirements for a Robotaxi and a humanoid robot are remarkably similar: they both need to perceive their environment, process data, and move safely. As China scales Level 4 Robotaxi fleets, Valeo is well positioned to supply the critical "eyes" for these vehicles. For example,

our third-generation LiDAR, Valeo SCALA™ 3, generates a 3D point cloud at a rate of 12.5 million pixels per second with a detection range exceeding 200 meters. This automotive-grade perception is exactly what is required to navigate the chaotic, high-density urban environments of China's mega-cities.

As we look toward 2028 and the rise of Embodied AI, we are actively adapting our automotive sensor suites for the robotics sector. A humanoid robot navigating a warehouse or a hospital relies on the same type of ultrasonic sensors, cameras, radars and LiDARs that we currently mass-produce for vehicles. Because Valeo manufactures these sensors at an automotive scale - having produced more than 2 billions of ultrasonic sensors - we can provide the robotics industry with highly reliable, cost-effective perception hardware that accelerates their path to commercialization. At industrial level, Valeo can also be part of the eco-system for training robotics in a real production environment, which is extremely important for humanoid practice applications.

KEY FIGURES*

The Chinese Automotive Industry

China remains the driving force of the global automotive industry, combining unmatched scale with rapid technological transformation. In 2025, the market continues to lead both in production volume and in the adoption of electrified and intelligent vehicles. With strong growth in New Energy Vehicles (NEVs), increasing export capacity, and fast-paced innovation cycles, China is not only the largest automotive market in the world but also the most advanced testing ground for the future of mobility: from electrification to autonomous driving and Software-Defined Vehicles.

Market size

In 2025, China automotive industry produced

34
MILLION VEHICLES**

€1.38

TRILLION
China automotive industry estimated turnover

>1/3

of all vehicles produced worldwide



16.5

MILLION UNITS

New Energy Vehicles sold



BEVs sales accounted for **64,4%**



PHEVs sales accounted for **35,5%**

Market growth

27 MILLION VEHICLES

were registered in China in 2025



Estimated Motorization rate

230

vehicles per 1,000 people



Exports



7

MILLION UNITS

Total export volume

1.6M UNITS

BEVs export volume

800 000 UNITS

PHEVs export volume



*China SAE **Passenger Vehicles & Commercial Vehicles

[#] key trends Shaping China's Automotive Future

1. Experience Economy: The Vehicle as a "Third Living Space"

Beyond mobility, the Chinese market is driving a massive **Experience Economy** (expected to reach €5,900Bn by 2029). In-car experiences are becoming multisensory and deeply personal, featuring **AI companions (NOMI), ambient lighting, smart fragrances, and massage seats**. The car is now a sanctuary for "Immersive Living Experience" and emotional well-being.

2. Electrification Inflection: Beyond Adoption to High-Tech Maturity

In 2026, China has moved past simple EV adoption to a technological watershed. With NEV penetration consistently exceeding 50%, the focus has shifted to **ultra-fast charging (4C/6C)**. Electrification is now defined by **800V architectures** and **next-gen thermal management** as standard requirements, resulting in a total "de-ICEing" of the supply chain even in entry-level segments.

3. Hyper-Efficiency: Maximizing Value within Fixed Budgets

While **52% of consumers are tightening their budgets**, their expectations for quality and technology remain uncompromising. This has created a "Value-Driven" upgrade trend, where flagship technologies (L2, smart cockpits) are now standard in the **100k-200k RMB segment**. OEMs must achieve "High Quality at Entry Prices" to remain competitive in this ultra-rational market.

4. Silver Mobility Revolution

China is facing a "Serious Aging" challenge, with the **60+ population projected to reach 38% by 2050**. This is accelerating the demand for **Senior-Care Mobility**: simple, safe, and intuitive interfaces that move away from "Complex Tech" toward "Human-Centric Safety." This includes **Vehicle-Road-Cloud integration** to ensure maximum protection for elderly drivers and passengers.

5. Outdoor Lifestyles & Off-Grid Freedom

Wellness is moving outside. With **88% of people participating in outdoor sports**, vehicles are being re-engineered as mobile basecamps. Integration of **V2L (Vehicle-to-Load)** for off-grid power, personal hygiene facilities, and even **drone pairing** for content creation are becoming mainstream requirements for the new adventurous Chinese middle class.

6. Localization at Unmatched Speed

The pace of innovation has reached a point where "time-to-market" is the ultimate KPI. Foreign OEMs are localizing not only their supply chain and production, but also their development and decision making centers, to innovate *at the speed of China*.

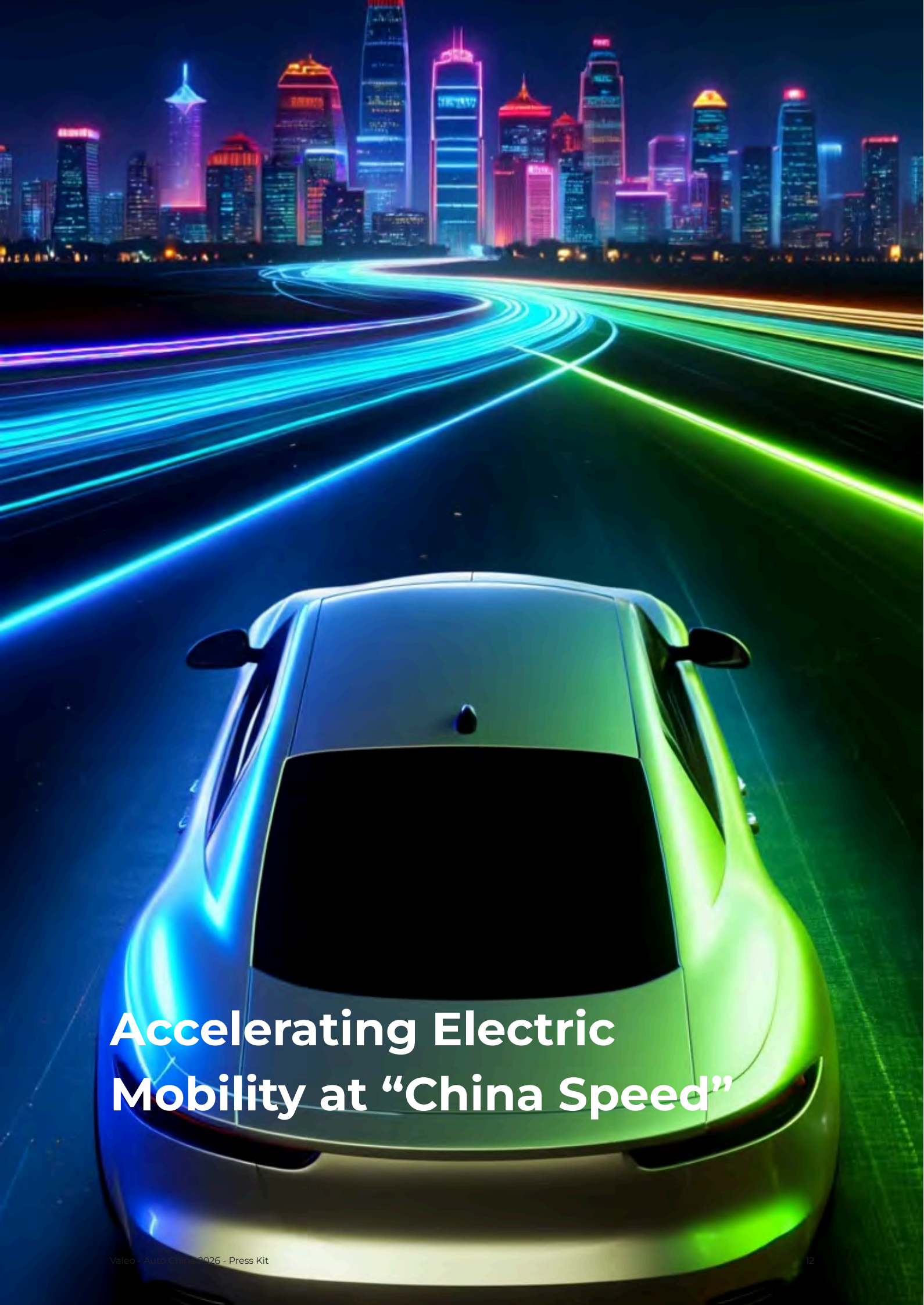
7. Robotaxis: From Pilot Projects to Urban Reality

The threshold of **1,000-vehicle fleets** has been crossed by leaders like **Pony.ai** and **WeRide**, signaling a shift from technology validation to routine commercial service. With **15 cities** now hosting active pilots and over 35,000 km of test roads, robotaxis are becoming a sustainable revenue-generating service. Chinese players are now expanding overseas, securing trial permits and partnerships in the Middle East and Europe.

8. Rise of the "Embodied AI": Humanoids in Factories

2026 is the **watershed year for humanoid robots** (Embodied AI) within the automotive supply chain. Beyond the hype, robots like **Xiaomi's CyberOne** and **XPeng's Iron** are now "interning" on assembly lines, performing precision tasks like nut loading and flexible sorting. With **XPeng** aiming for mass production by the end of 2026 and **BYD** targeting an internal deployment of **20,000 units**, the factory of the future is here. For Valeo, this convergence of "wheeled robots" (cars) and "bipedal robots" (humanoids) opens new frontiers for shared hardware and AI architectures.

**Sources : Nutiani, Iimedia, Iresearch, Catarc, Mobility portal*



Accelerating Electric Mobility at “China Speed”

Electrification: Redefining Automotive Cycles

Time-to-Market Excellence

In the world's most dynamic automotive market, Valeo has established a new global benchmark for development cycles. **"China Speed"** is defined by an exceptional ability to move from breakthrough concept to industrialization in record time. **While the following major innovations were unveiled only a few months ago, their production has already started in early 2026:**

- **Highly Integrated 5-in-1 "Deep Integration" Power Electronics Module:** Unveiled in July 2025 to address the need for extreme compactness, this module has reached SOP in March 2026 for a major Chinese automaker.
- **New Generation Dual Layer Heating, Ventilating, and Air Conditioning (HVAC) System:** This revolutionary thermal technology, designed to optimize EV range in winter, entered SOP in March 2026 for several Chinese partners.
- **Next-Generation Dual Inverter Solution:** Originally showcased to support high-performance hybrid architectures, this breakthrough solution is hitting the roads in the next few weeks following SOP in April 2026 for two leading Chinese OEMs.

These rapid executions demonstrate Valeo's unique capacity to align local R&D with advanced manufacturing to deliver high-tech integrated systems at an unprecedented pace, perfectly synchronized with the pulse of Chinese innovation.

Enabling affordable, efficient and scalable electrification

As electrification continues to reshape China's automotive market, the focus is shifting toward solutions that combine performance, affordability and system efficiency. Valeo is developing technologies designed to address the market's next challenges including rapid expansion of NEVs, the rise of EREV and PHEV architectures, and increasing expectations for compact and intelligent vehicle platforms.

At Auto China 2026, Valeo showcases a broad range of innovations spanning electrification systems, thermal management, power electronics and energy management solutions. Together, they reflect a clear ambition: to support the next era of mobility with technologies that improve efficiency, optimize packaging, support charging performance and extend expertise beyond the vehicle itself.

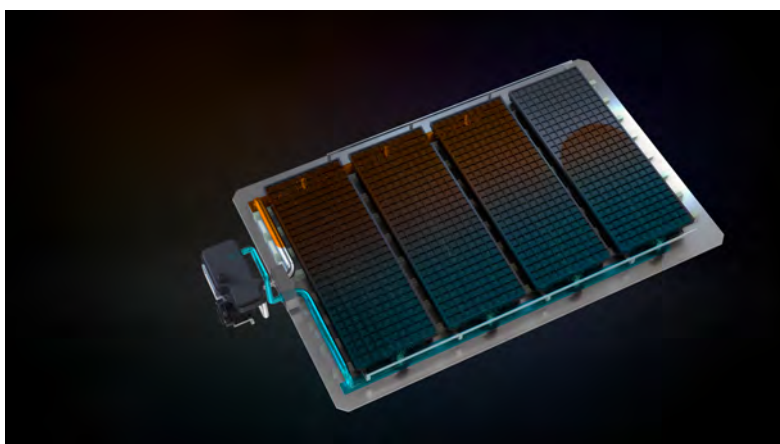
From advanced eAxles and compact high-voltage solutions to smart thermal management systems, Valeo highlights how electrification is becoming not only more powerful, but also more accessible, more integrated and more scalable.

Powering the Global Transition: Valeo's Scalable Systems for All EV Needs

Valeo presents its **Valeo Power eSkateboard**, a platform demonstrating high-performance, integrated systems already reaching the market. This comprehensive architecture serves as a **global system** balancing advanced propulsion with industry-leading thermal management to meet the diverse needs of the worldwide automotive market.

A Unified Approach to Performance and Range

Valeo is breaking the silos between the powertrain and climate control to secure EV range in all conditions. Valeo offers an eAxle range from 48V to 800V: the platform features a **350kW magnet-free Externally Excited Synchronous Motor (EESM) primary motor and an ultra-flat coaxial secondary eAxle** for smart all-wheel drive. This Secondary eAxle is designed specifically for an ultra-flat profile, which preserves critical space for a "frunk" (front trunk) or additional cabin storage. This propulsion power is balanced by a **Dual Layer Heating, Ventilating, and Air Conditioning (HVAC) and a PFAS-free R290 Heat Pump**. This 'all-in-one' solution, featuring a hermetic, low-charge heat pump module, uses a centralized coolant hub to efficiently power the HVAC, the front cooling, and the battery management within a safe, compact architecture. Together, these systems ensure passenger comfort and battery longevity while a mechanical disengagement system on the secondary axle eliminates drag to extend driving range.



Mastering Compactness through Innovation

As EV designs prioritize aerodynamics, Valeo is redefining the vehicle's front-end architecture with its **Valeo eSilentFlow**: its ultra-flat design saves 100mm of Z-axis space, allowing for the sleek, low silhouettes of modern EVs while reducing electrical consumption by 20% compared to traditional

radiators. This philosophy extends to the **latest generation of On-Board Chargers and DCDC converters**, leveraging GaN (Gallium Nitride) and planar transformers technologies, Valeo drastically increases power density.

Safety and Speed: The Flash Charging Revolution

True system integration is best demonstrated in the battery assembly with **Valeo's Laser Welded Battery Coolant Plate** or its **Immersive Battery Cooling solution**. This immersive cooling solution uses dielectric fluid to stop thermal runaway, enabling 5C ultra-fast charging (20-80% in just 12 minutes). This modular approach not only extends battery life by 30% but also reduces the material carbon footprint by 40%, proving that high-tech performance and environmental responsibility are now inseparable.

Innovation Focus: Compact 5-Way Refrigerant Valve



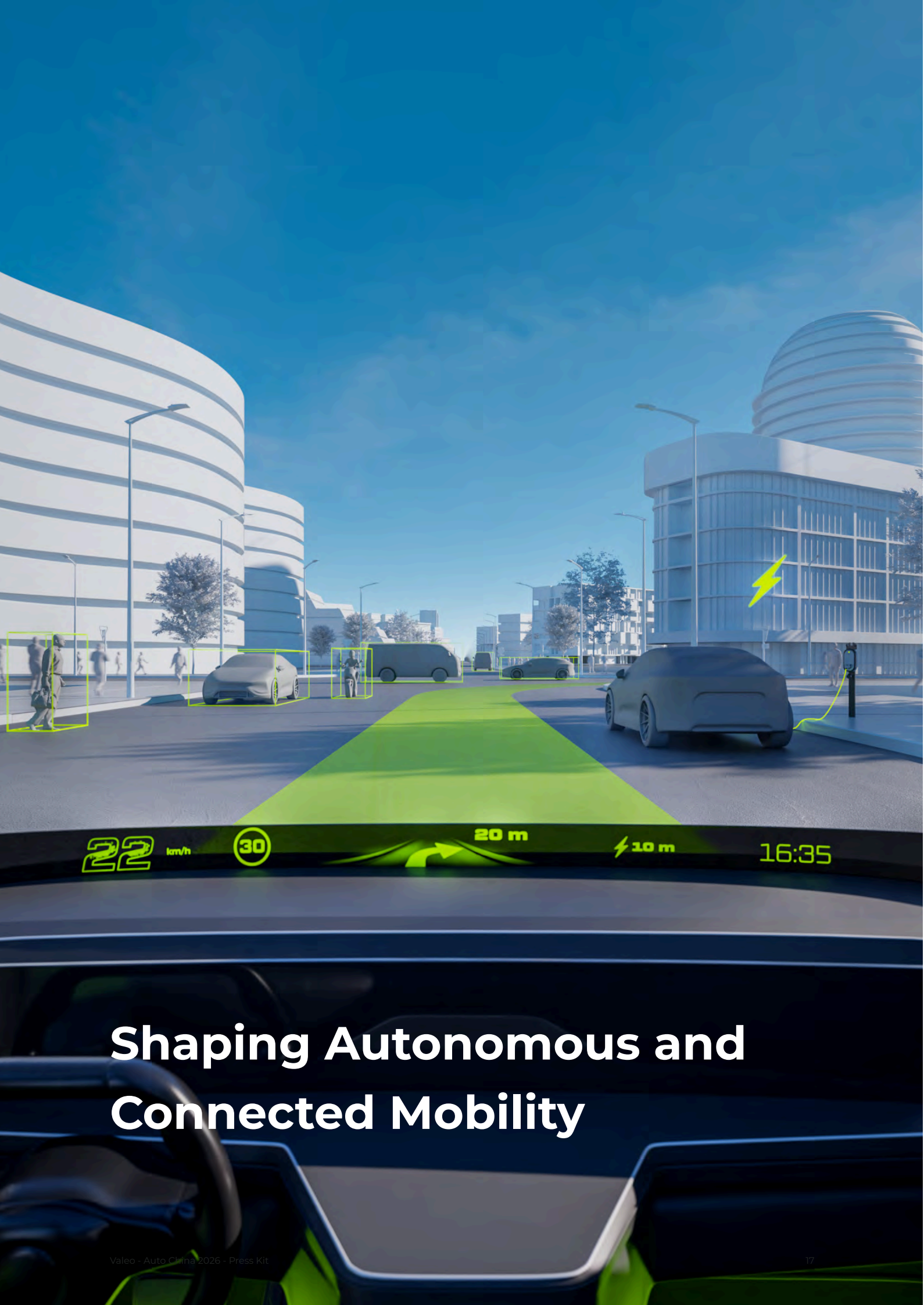
Valeo has been named a CES Innovation Awards® 2026 Honoree, in the category “Vehicle Tech & Advanced Mobility”, for its **Compact 5-Way Refrigerant Valve for Electric Vehicles’ Heat Pump Systems**. A breakthrough in EV thermal management, this single ultra-compact unit replaces four traditional valves, significantly reducing system complexity and weight. Compatible with next-generation refrigerants like R-290, it optimizes energy efficiency to make electric mobility smarter and more accessible. Scheduled for production in September 2026, it represents the next step in Valeo’s mission to innovate at the heart of the EV revolution.

Smart Energy Management: The SDV as an Intelligent Steward

In the era of the Software-Defined Vehicle (SDV), Valeo turns thermal management and charging into a seamless, value-adding service.

- At the core is **Valeo Predict4Range**, a sophisticated software that intelligently orchestrates all energy flows, from HVAC and Heat Pump control to the Thermal Comfort Index software. This centralized approach can extend EV range by up to 24% and significantly reduce charging time on long trips.
- **Driveline Intelligence**: Valeo's software acts as the brain of the hardware; for instance, the two-speed eAxe software reduces consumption by up to 7%, while the eDisconnect system intelligently increases range by up to 10%.
- **Beyond the Vehicle**: Valeo showcases Vehicle-to-Grid (V2G) integration, transforming the car into a flexible energy asset for the home and the network.
- **The Centralized Brain**: To execute this full software stack, Valeo offers the Powertrain Domain Controller. This hardware integrates up to 10 subsystems (Inverter, On-Board Charger (OBC), Vehicle Control Unit (VCU), etc.) into a single unit, simplifying maintenance and maximizing assembly efficiency.





Shaping Autonomous and Connected Mobility

Valeo Accelerates Autonomous and Connected Mobility in China

As the global automotive industry shifts toward Software-Defined Vehicles (SDV), Valeo is leading this transformation by delivering the key technologies that make mobility safer, smarter, and more intuitive.

At Auto China 2026, Valeo showcases a fully integrated ecosystem combining high-performance sensors, centralized computing, and immersive user experiences, designed to meet the speed, scale, and innovation demands of the Chinese market.

Highway Navigation on Autopilot (NOA)

At Auto China 2026, Valeo announces a major functional expansion of its Valeo Smart Safety 360 (VSS360). The breakthrough ADAS controller now supports **Highway Navigation on Autopilot (NOA)**, bringing high-end automated driving capabilities to the mass market without the premium price tag. This technology was introduced to the Chinese market in Q1 2026 by a global brand under a Chinese OEM group.

Redefining the Entry-Level Experience

By integrating NOA in the VSS360 solution, Valeo is bringing a high-level driver assistance feature that allows the vehicle to follow a navigation route autonomously under driver supervision. The Valeo NOA 2-Box solution integrates a comprehensive sensor suite, including front, surround, and rear cameras alongside radars and ultrasonics to master the complexities of highway and urban expressway navigation. The system is engineered to provide a hands-on driving experience that prioritizes safety, regulatory compliance, and driver comfort. Its development leverages mature computer vision foundations and a highly adaptable system architecture, ensuring reliability and scalability. While traditional Adaptive Cruise Control (ACC) simply maintains speed, NOA-equipped vehicles can automatically change lanes to overtake slower traffic, navigate highway interchanges and transitions and adjust speed based on map data and traffic flow.

High-End Automation for All

Valeo Smart Safety 360 is a cost-optimized, scalable platform that enables OEMs to deliver best-in-class driving performance. By utilizing the **Smart Front Camera** as a centralized, passive-cooled computer. Valeo created a "Plug-and-Play" architecture, enabling manufacturers to scale from basic safety to Level 2 automation on a unified platform.

A 360° ADAS Vision: From Perception to Experience

Perceiving the World: Industry-Leading Sensor Technologies

The Brain Cocoon: Making the Invisible Visible

The Valeo Brain Cocoon is a striking, transparent demonstrator designed to make the invisible visible. This plexiglass architecture offers a holistic view of Valeo's core expertise, illustrating the seamless convergence of hardware and software that powers the Software-Defined Vehicle (SDV).

The Brain Cocoon embodies Valeo's dual commitment: shielding occupants from the outside world while fostering a sense of well-being within. It integrates:

- **A Full Perception Shield:** The widest portfolio of perception technologies on the market, backed by an AI-based software stack for signal processing and computer vision.
- **Centralized Intelligence:** All sensor data is hosted in a **Central Compute Unit**, complemented by Zone Controllers, illustrating the evolution toward centralized E/E architectures.
- **Interior Experience:** Intuitive Human-Machine Interfaces (HMIs), including smart surfaces, displays, and Augmented Reality Head-Up Displays to provide critical information at the right time.



Innovation Focus: The Power of Valeo SCALA™ LiDAR

Valeo was the first company to market a LiDAR meeting stringent automotive safety criteria. At AutoChina 2026, Valeo presents its third-generation technology essential for Level 3 and 4 autonomous driving.

- **Valeo SCALA™ 3 Evo:** This high-resolution system operates seamlessly from **behind the windshield**, overcoming complex optical challenges to offer a 50% size reduction while providing a richer, more precise point cloud.
- **Unmatched Perception:** The system scans the vehicle's environment **25 times a second**, combining long-range detection (over 200 meters) with a wide field of vision to detect, identify, and categorize all surrounding objects.
- **Anticipatory Safety:** Advanced algorithms track moving objects even when they leave the driver's field of vision, anticipating their trajectories to trigger necessary safety maneuvers.
- **Cloud-Enhanced Protection:** Beyond protecting occupants and vulnerable road users like pedestrians and cyclists, the system can alert other vehicles to road hazards via the cloud.
- **All-Weather Performance:** Valeo SCALA™ LiDAR sees what the human eye, cameras, and radars cannot, adapting to extreme light conditions and even evaluating raindrop density to adjust braking distances.

Thinking Faster: Centralized Intelligence for Software-Defined Vehicles

As vehicles evolve toward software-defined architectures, Valeo is driving the transition from distributed electronic systems to centralized intelligence.

Valeo's solutions include:

- **High-performance central compute units**, capable of processing massive sensor data in real time.
- **Scalable domain and zone controllers**, enabling flexible vehicle architectures.
- Integration of **ADAS and in-vehicle infotainment (IVI)** into unified platforms.

This centralized approach significantly reduces system complexity, optimizes costs, and accelerates development cycles, key advantages in the highly competitive Chinese market.

By combining hardware and software expertise, Valeo enables OEMs to deploy new features faster, update vehicles over the air, and continuously enhance performance throughout the vehicle lifecycle.

Enhancing Interaction: A New Dimension of User Experience

Valeo is redefining the relationship between the driver, the vehicle, and automation. Its advanced Human-Machine Interface (HMI) solutions ensure that critical information is delivered seamlessly and intuitively:

- **Valeo Panovision**, projecting key information directly into the driver's field of view. Building on its established position in reflected display technology, Valeo offers different Panovision (Panoramic Head-Up Display) solutions with a projection into the black coating at the bottom of the windshield or directly onto the transparent area of the windshield. A major Chinese OEM has selected the first solution for its new model with production expected to start in the second half of 2026.
- **Augmented Reality Head-Up Displays**, enhancing situational awareness. Valeo offers a full range of automotive Head-Up Displays (HUD) systems which show information in the driver's field of vision, several meters ahead, to provide safety by limiting the driver's distraction but also comfort.
- **Interactive interfaces**, enabling smooth and natural interaction. Valeo is introducing a new concept of steering wheel and vision, where steer-by-wire technology offers less wheel rotation and allows a better user experience tailored to the selected driver's mode.
- **SteerUX interfaces**, enabling smooth and natural interaction.

These technologies support a safe and seamless transition between manual and automated driving modes, reinforcing driver confidence and comfort.

Valeo XR Gaming: Bringing Immersive Experiences On the Road

Valeo is taking automotive gaming "on the road" by transforming the journey into an immersive experience. **Developed in partnership with Holoride and Unity China**, Valeo XR Gaming moves beyond static gaming to create an immersive "Infinite Runner" style experience played during transit.



- **Seamless Reality-Virtual Fusion:** Valeo Racer uses the vehicle's **live cameras, ADAS sensors, and machine learning algorithms** to stream real-time perception data directly into the game.
- **Immersive Gameplay:** The live road environment serves as the gameplay arena, incorporating real-world objects and movements as active elements.
- **Location Awareness:** Leveraging Valeo's AR expertise, the system generates location-based content, ensuring a dynamic and unique experience for passengers while the car is in motion.

Valeo as a key partner for connected mobility in China

Valeo has solidified its position as a strategic partner **for Telematics Control Units (TCU) in China**, securing major contract wins for 4G and 5G projects in the last six months. Valeo is well positioned to capitalize on the upcoming Chinese regulation on eCall (July 2027) creating new business opportunities in China.

Developing innovative solutions for connected cars is the result of strong technical and industrial expertise, global and local R&D and collaboration with different players of the ecosystem. Valeo TCUs are essential for a connected and smarter mobility and serve as the backbone of the SDV revolution, enabling seamless data exchange, enhanced safety, immersive user experiences, easy vehicle maintenance and update.

Advanced Solutions for Two-Wheelers

Valeo is extending its automotive leadership to the two-wheeler sector with the **Skeleton Motorbike**, a functional demonstrator showcasing **Advanced Rider Assist Systems (ARAS)** and connected solutions.

The **Skeleton Motorbike** demonstrator showcases Valeo's Advanced Rider Assistance Systems (ARAS):

- **Front and Rear ARAS:** Utilizing front and rear **Radar and Camera** sensors, the system provides critical safety features including **Forward Collision Warning (FCW)**, **Blind Spot Detection (BSD)**, **Lane Change Assist (LCA)**, and **Rear Collision Warning (RCW)**.
- **Rider Monitoring System:** A wide-field-of-view IR camera ensures safety compliance by detecting in real-time whether the rider is wearing a **helmet** and maintaining **hands-on-handlebar** contact.

This extension highlights Valeo's ambition to improve safety and efficiency across all forms of mobility.

- **3-in-1 Connected Cluster:** A smart display that merges bike telemetry, geofencing (5G/GNSS), and navigation.
- **Access & Connectivity:** The cluster integrates **Phone-as-a-Key (Paak)** technology, allowing riders to secure and start their vehicle seamlessly via smartphone.
- **Integrated Power (iSMMG):** The bike features an ultra-efficient (90%+) **2-in-1 eMotor and Inverter**, a dedicated, heavy-rare-earth-free solution for electric two-wheelers.



Redefining Safety and Style in the SDV Era

Shaping Safe Mobility, In-Cabin Experience and Sensor Vision

As the Chinese market leads the global transition toward **Software-Defined Vehicles (SDV)** and **Autonomous Driving**, the need for visibility has evolved beyond simple illumination. Valeo is at the heart of this transformation, ensuring maximum safety, visibility and protection for drivers, road users, and autonomous mobility systems under all conditions.



Enabling Safer, Smarter and More Efficient Mobility

In China, Valeo solutions equip both historical OEMs and new technology-driven players, supporting the region's rapid transition toward smarter mobility focusing on four strategic pillars:

- **Safety**, by enhancing the driving environment and clarifying vehicle intentions to road users and passengers in full compliance with global regulations.
- **Style**, by enabling automakers to express their unique brand identity through innovative interior and exterior designs that offer a personalized driver experience.

- **Performance**, through the design of future-proof, scalable systems engineered for Software-Defined Vehicles (SDV) and reusable platforms.
- **Sustainability**, driven by a commitment to reducing the carbon footprint of its operations while maximizing product lifecycles.

By merging hardware excellence with software intelligence, Valeo provides the high-performance systems that allow Chinese automakers to define the next generation of mobility while meeting the highest global safety standards.

Exterior Lighting: Powering the latest XPeng vehicles

At Auto China 2026, Valeo proudly showcases its latest advancements in front-end lighting, headlined by its supplying of high-performance solutions for the **XPeng P7** model, marking a significant milestone in its local footprint. Building on this momentum, Valeo introduces a breakthrough in styling with its **first "CtoC" (Coast to Coast) appliqué** developed for the Chinese market, marking a first for XPeng in China.

- **Seamless Integration:** Spanning an impressive **1570 mm in length**, this edge-to-edge light signature provides a bold, ultra-modern aesthetic.
- **Superior Quality:** The system achieves exceptionally **high homogeneity**, ensuring a smooth, consistent glow across the entire front fascia of the vehicle.
- **XPeng P7 Specialization:** Valeo unveils the P7 front fascia module featuring **ultra-compact ThinLED technology** (6 multi-modules) for optimized light distribution, alongside an illuminated logo and variable-intensity position lamps. Combined with vertical position lamps, the XPeng P7 front fascia offers a strong branding statement.



Pioneering Smart Visibility: From Precision to HD Projection

Valeo is transitioning lighting from a basic safety feature to a high-definition communication tool. By merging 20 years of expertise with cutting-edge SDV capabilities, we offer a scalable range of intelligent solutions.

Adaptive Driving Beam (ADB): from anti-glaring solutions to projection for safety and entertainment

Valeo's ADB systems ensure the maximum illumination of the road ahead with high beam activation, without blinding oncoming traffic, scaling across three levels of precision:

1. **Matrix Technology:** Selectively deactivates specific LEDs to create a "shadow box" around oncoming vehicles while keeping the rest of the road fully illuminated.
2. **Pixel Technology:** Refines the anti-glare zones with higher granularity, significantly improving driver comfort and light distribution.
3. **HD Pixel Lighting (up to 1.3 Million Pixels):** Representing the pinnacle of Valeo's expertise, this HD version maintains superior anti-glare performance while transforming the road into a digital canvas. It enables the **projection of critical driving information**, such as navigation cues, or safe distance alerts, directly onto the pavement for unmatched situational awareness.



Smart Lighting Systems: A Software-Led Approach to Safety & Personalization

Hardware is nothing without intelligence. Valeo combines its hardware excellence with a library of hardware-agnostic software stacks such as SAFELight or CUSTOMLight.

- **Future-Proofing:** Compatible with major ecosystems (AUTOSAR, Android), it allows OEMs to pre-install premium hardware that can be upgraded later.
- **On-Demand Safety & Customization:** Through **Over-The-Air (OTA)** updates, advanced ADB functions can be activated instantly upon regulatory approval or offered as a personalized premium subscription for the end-user.

UHD Infotainment: A Colorful Partnership with Appotronics

Valeo is also expanding the role of lighting beyond security into the realm of **Infotainment and "Life Moments."**

- **Ultra-High Definition (UHD) Projection:** Valeo introduces cutting-edge UHD lighting solutions that transform the vehicle's surroundings into a versatile digital canvas.
- **ALPD® Technology Integration:** In a strategic partnership with **Appotronics**, Valeo is integrating the exclusive **ALL-in-ONE full-color laser headlight module** into its systems. This integration specifically targets Valeo's **headlamps (projectors)**, leveraging Appotronics' proprietary ALPD® semiconductor laser technology.
- **Unmatched Performance & Efficiency:** This UHD module delivers **10 times the brightness** of standard automotive LEDs and 200% greater luminous flux, all while maintaining superior energy efficiency.
- **Immersive User Experience:** By embedding this high-definition projection engine directly into the headlamps, Valeo enables complex exterior functionalities:
 - **Safety & Navigation:** High-resolution ground projections for driver assistance and pedestrian alerts.
 - **Outdoor Entertainment:** The ability to project movies or video content onto flat surfaces outside the vehicle (outdoor cinema mode).
 - **Smart Adaptability:** Features include auto-focus, keystone correction, and 10-level brightness adjustment for a perfectly tailored lighting experience.

Ecosystem for Innovation

Valeo and RESRG, a leading global supplier of coated exterior systems and components, extend their partnership to redefine the future of exterior lighting.

The partners will continue working on illuminated front panels but also adding lighting functionality to exterior components such as grilles, bumpers, spoilers, tailgates, and rocker panels. The partnership, initiated in 2022 for Europe and North America, is also extended to include China.

Precision Cleaning for the Autonomous Era

Valeo AquaBlade™: Shaving Milliseconds to Save Lives

The **AquaBlade™ is a game-changer**. By replacing traditional spray nozzles with a fluid distribution system integrated directly into the wiper blade, it eliminates the "blind period" during windshield washing.

- **Quantifiable Safety:** This technology saves **288 milliseconds of reaction time**, which translates to a **4-meter reduction in stopping distance at 50 km/h**.
- **Smart Maintenance & Connectivity:** The system enables **automated windshield defrost and debug capabilities** that can be activated remotely via smartphone. These features are already in serial production for the Chinese market, offering drivers premium convenience and instant visibility in all weather conditions.
- **Efficiency & Weight Reduction (-2kg):** The precision of the AquaBlade™ system reduces washer fluid consumption by up to **50%**. By requiring a smaller fluid reservoir, it contributes to an overall vehicle **weight reduction of 2kg**, directly enhancing energy efficiency and reducing the environmental footprint.



LiDAR Cleaning System: Ensuring the Reliability of Autonomous Driving

As China moves toward mass commercialization of ADAS features, sensor reliability is paramount. Valeo's world-first mass-produced LiDAR cleaning system ensures that ADAS system remains functional in the most demanding environments.

- **High-Speed Performance:** Designed to maintain sensor clarity at speeds up to 130 km/h, ensuring L3 functions remain active on highways.
- **Extreme Weather Ready:** Featuring integrated or retractable nozzles, the system provides rapid de-icing and remains fully operational at temperatures as low as -20 °C.
- **Smart Pilot:** Intelligent control limits fluid consumption, preserving vehicle range while ensuring that the "eyes" of the autonomous vehicle never go blind.

Valeo offers a complete range of cleaning systems to ensure the functioning of optical sensors (LiDAR, camera, etc) regardless of weather and environmental conditions.



Expanding Mobility Beyond the Automotive World

Bringing Valeo's expertise to Humanoids

Valeo is leveraging its deep expertise in sensing, motion, and AI to accelerate the integration of humanoid robotics into the industrial landscape. The Group also masters a comprehensive portfolio of automotive-grade software and components that can be adapted for humanoid and AGV needs.

Expertise Built on Two Years of Field Evaluation

Since June 2022, Valeo has been rigorously benchmarking the robotics landscape. Following a global consultation with 43 suppliers, the Group selected 11 partners for real-world testing in 2025. This phase ensures that the technology meets the extreme precision and safety standards of a high-tech automotive workshop.

A Center of Excellence in Nanjing

This year, Valeo is launching its first specialized training center in Nanjing, China. Led by high-level AI experts, the center utilizes **VLA (Vision Language Action)** models to train robots for complex logistical tasks. Thanks to its global network of more than 200 AI experts and its AI research center, Valeo is developing its own models and furthers its ambition to achieve greater technological autonomy in artificial intelligence. The Nanjing hub will also serve to upskill Valeo teams, preparing employees to program and supervise these next-generation production tools.

Addressing Ergonomics and Safety Challenges

The primary ambition is to utilize humanoid robotics to relieve human teams of the most strenuous, repetitive, or hazardous operations. By focusing initial use cases on non-ergonomic and heavy tasks.

Becoming a Technology Provider for Robotics

Beyond its own factories, Valeo is transferring its industrial know-how to the booming robotics market. The Group masters a comprehensive portfolio of automotive-grade software and components that can be adapted for humanoid and AGV needs:

- **High-Performance Actuators:** Robust "muscles" for arms and torsos, leveraging Valeo's mass-production expertise in electric motors.
- **AGV-Based Mobility & Sensing:** Utilizing Valeo's leadership in software, LiDARs, ultrasonic sensors, and cameras to provide robots with hardware and software for 360° awareness and autonomous navigation on the factory floor.
- **Thermal & Power Management:** Specialized cooling and power electronics to optimize robot battery life and manage the high thermal loads of processors and joints.



Overview

Valeo: At the forefront of innovation

Valeo is a technology company and partner to all automakers and new mobility players worldwide. The company innovates to make mobility safer, smarter and more sustainable. Valeo enjoys technological and industrial leadership in electrification, driving assistance systems, reinvention of the in-car experience and lighting everywhere. These four areas, vital to the transformation of mobility, are the Group's growth drivers.

Valeo Worldwide



€ 20.9 billion

In sales



29

Countries



100,000

Employees



149

production sites



59

R&D centers



19

distribution platforms

Valeo in China



17,000

Employees



22

production sites



10

R&D centers

Innovative solutions to meet **new mobility** requirements

Valeo is structured with three well-balanced, coherent Divisions — **Valeo Power**, **Valeo Brain** and **Valeo Light** — that offer innovative solutions to meet the major changes in the markets and aims at reducing CO₂ emissions and developing autonomous driving. Valeo enjoys leading positions in its main markets. Valeo also offers solutions for the automotive aftermarket and develops its technologies for non-automotive applications with its **Valeo Service** activity.

POWER



Valeo supplies an **end-to-end range** of technological solutions that cover **powertrains** and **thermal management** systems for **both** conventional and electrified vehicles, dedicated to supporting the transition to electrification.

BRAIN



Valeo is taking full advantage of the growing penetration of its driver assistance technologies by leveraging its broad portfolio of products, which include **sensors, central processing units and AI-based software**. Valeo has already supplied more than 2.2 billion units over the past 30 years and will produce another 1.5 billion over the next five years.

LIGHT



As electric and autonomous vehicles evolve, the lighting market is underpinned by style, performance, safety, and sustainability. Valeo A comprehensive range of systems to see and be seen, including **lighting, signaling and wiper solutions, control units and functional software** that provides all the performance, style, safety and durability features.



Valeo Service offers a variety of mobility aftermarket solutions, supplying **replacement parts and services** to car dealer networks, the independent aftermarket, EV recharging station installers and electric bike repair shops.

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