

# CES – the wrap

This year, the products seemed more tangible and conveyed immediacy

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In an automotive business increasingly defined by technology, the annual Consumer Electronics Show (CES) in Las Vegas has become the number one auto event on the calendar in terms of impact. The joint venture between Sony and Honda, now dubbed Afeela, epitomises how auto and tech have converged.

In 2023, some 300 exhibitors showcased their vehicle technology. Its increasing importance – usurping the traditional auto shows like NAIAS, Paris, IAA and Geneva along the way – is demonstrated if we wind back the clock to 2014. Then, there were just nine OEMs present and some 125 automotive technology exhibitors.

With this growth has also come maturity. The 2023 CES was less about fanciful concepts and more about tangible.

## Goodbye nebulous concept, hello production-ready product

Sure, we still had our fair share of undated pods and shuttles, but one glaring theme of the 2023 version of CES was how near-term so many of the announcements were.

Harman shed the actors and focused on a handful of production-ready products in the in-cockpit experience space, many of which have production wins already. Bose brought the next generation of 3D audio and EV sound enhancement to the show and applied them to current production vehicles. Blackberry displayed Ivy, its digital cockpit platform, once again, but this time it's ready to launch with automotive grade hardware in the form of the deal struck with Dongfeng Motors for the forthcoming Voyah electric crossover.

## CES is the place to launch a car (or at least an on-demand feature)

Attendance at CES was about 115k – up from the 40k of a COVID-impaired 2022 but still shy of the 171k of pre-COVID 2020. Those boots on the ground and a substantial amount of press buzz from the show have proven worthy of several vehicle announcements from the likes of Volkswagen, Peugeot, Volvo, BMW, Ram, Mercedes-Benz, Chrysler, and the aforementioned Sony Honda Mobility Afeela.

Beyond the vehicles themselves, an unavoidable trend of 2022 has been the vast interest and investment in software enabled in-vehicle features, often referred to as paid updates or features on demand.

Qualcomm partnered with Volvo to launch new subscription features on the new EX90 SUV including audio, navigation, and other monetizable services. Harman also announced Ready On-Demand, a software platform designed to deliver feature enhancements, upgrades, and monetization opportunities to the vehicle's headunit.

## Software-defined vehicles run the show

The term can be so broad it's almost all-encompassing, but it was seemingly everyone's favorite to use at CES.

Highlights include platforms from Continental and Aptiv, with the likes of AWS focused on cloud-based simulation and testing for the development of these vehicles.

A major subplot of CES 2023 was a pitch by suppliers to their automaker customers: let us help you with software.

Stellantis joined a growing list of automakers focused on the revenue potential of the software-defined vehicle, launching a dedicated business unit (Mobilisights) which will launch products developed from data from millions of connected vehicles.

## Not so fast – automated driving tech isn't going anywhere

The hype surrounding autonomous driving tech had taken a further hit during 2022, but applying that same thinking to developments in automated driving features would be unwise. L4 and L5 are different animals compared with where the industry sits in developing automated driving features.

While L2+ doesn't have an official SAE level designation, this is where much of the attention is directed with near-term production and a competitive landscape focused on execution rather than conceptualization.

Bosch offered a vehicle occupant safety approach that leverages existing hardware in the vehicle, while Continental painted a gradual vision of camera perception today that evolves to radar in the future.

In the mapping world, HERE launched a major overhaul to their mapping platform. Its new UniMap gives automakers greater flexibility and more up-to-date data. Meanwhile, Google made news with their new HD Map launching at Polestar. The developments by HERE and Google will both enable near-term ADAS enhancements.

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