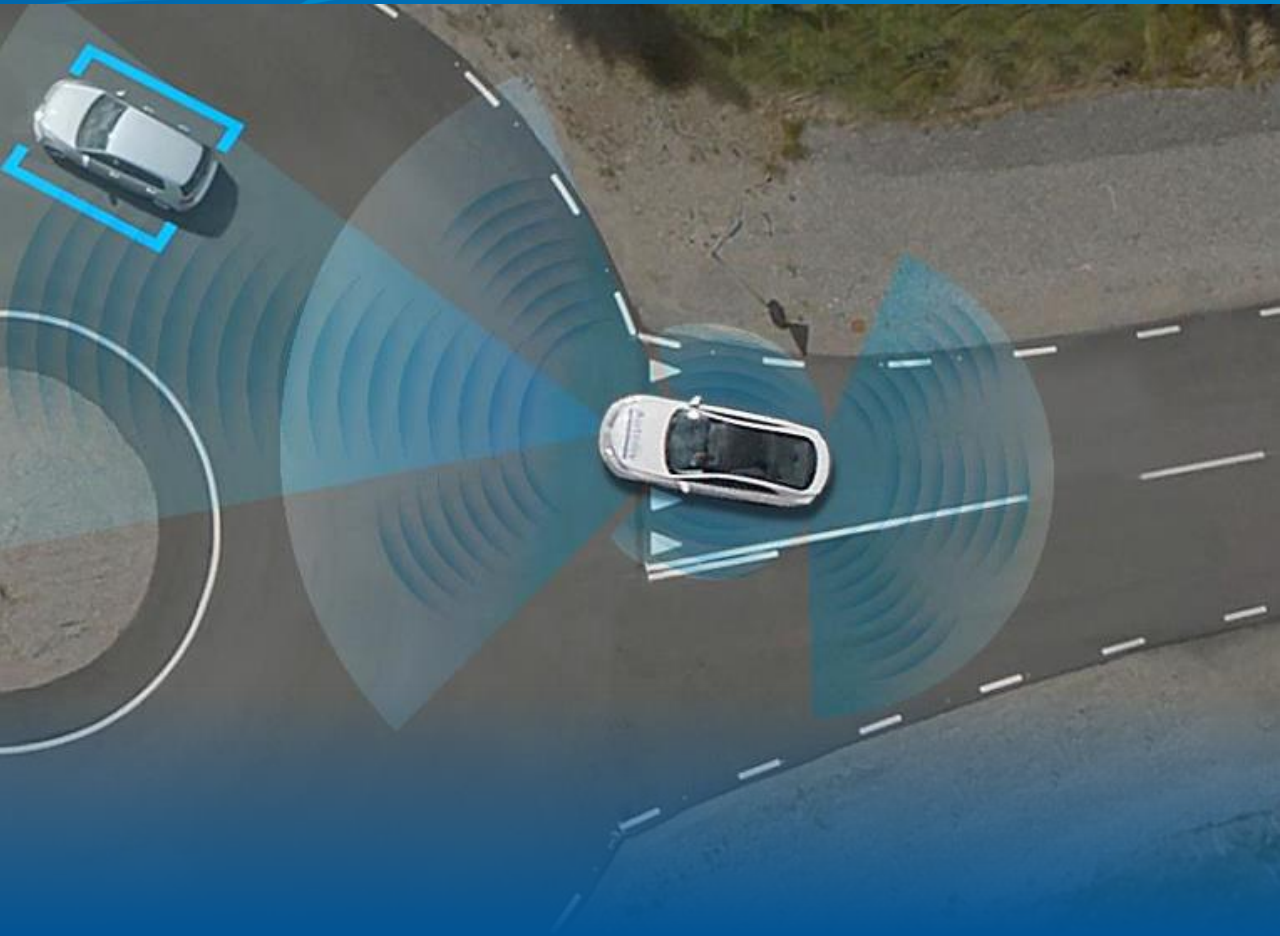


An aerial photograph of a road intersection. Three cars are visible: a white sedan in the upper center, a white sedan in the lower center, and a white SUV in the lower left. Each car is enclosed in a blue rectangular bounding box. Concentric blue circles radiate from each car, representing sensor waves or detection zones. A white circle is also visible on the road surface. The background shows green trees and a clear sky.

# The Future of Automotive Safety

Jan Carlson

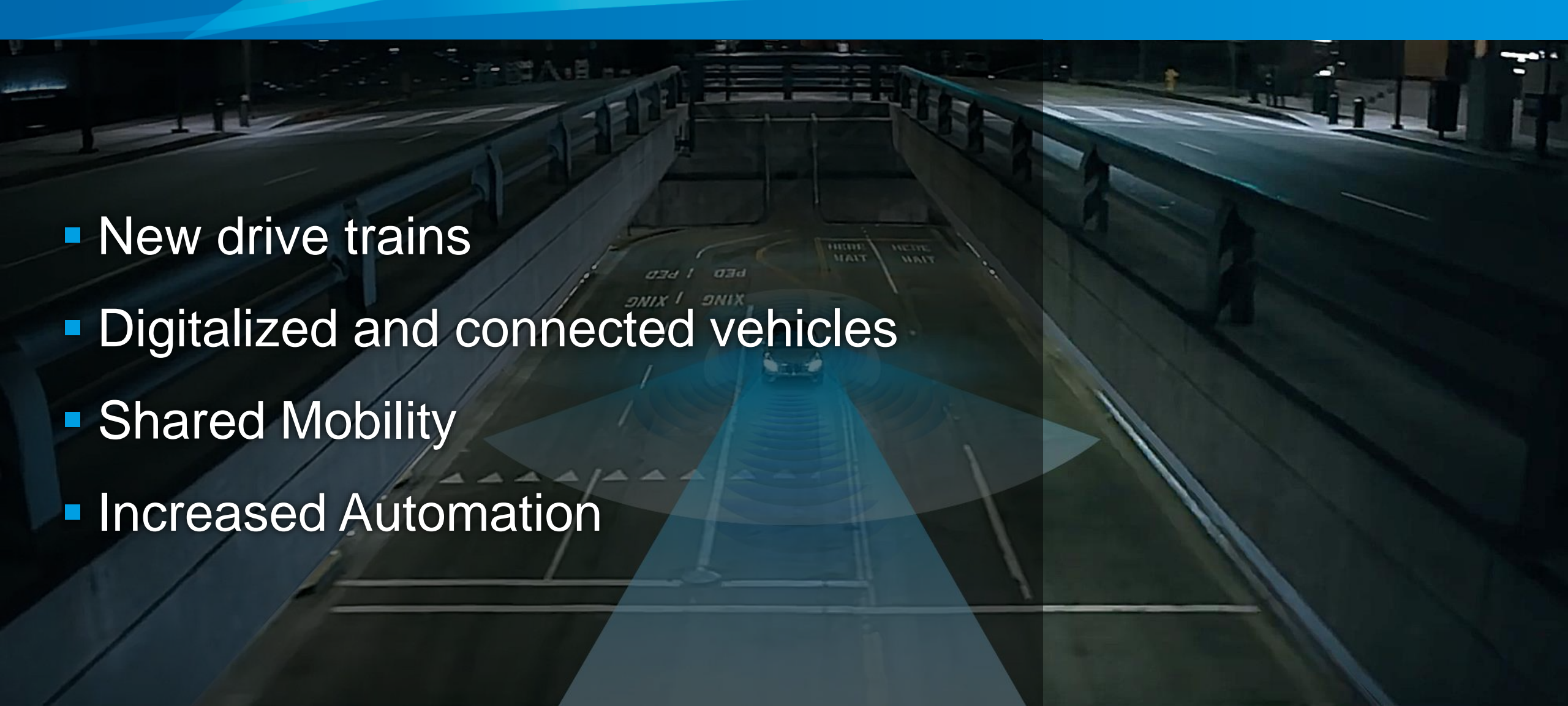
Chairman, President & CEO



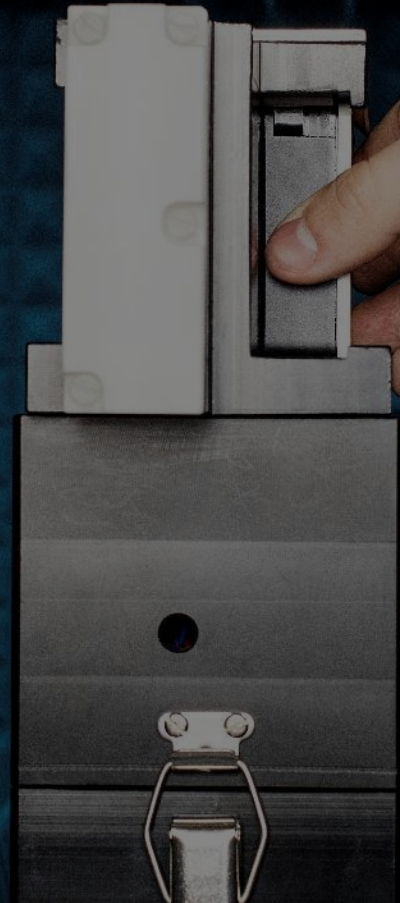
Prevent



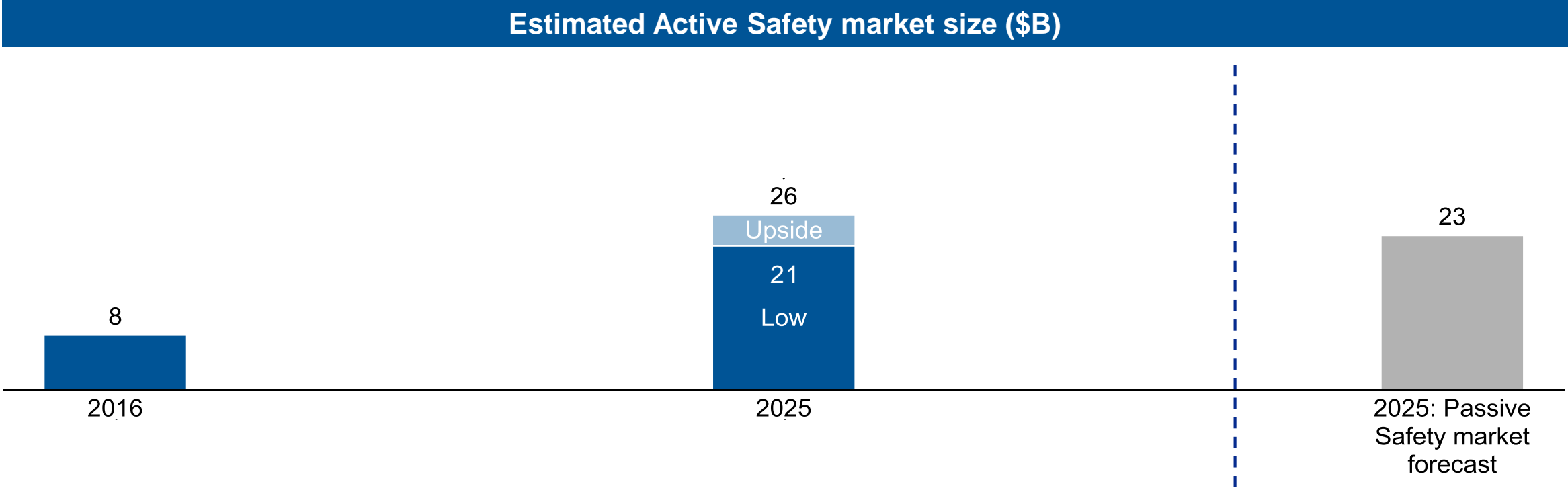
Protect

- 
- New drive trains
  - Digitalized and connected vehicles
  - Shared Mobility
  - Increased Automation

- Quality
- Robustness
- User Experience

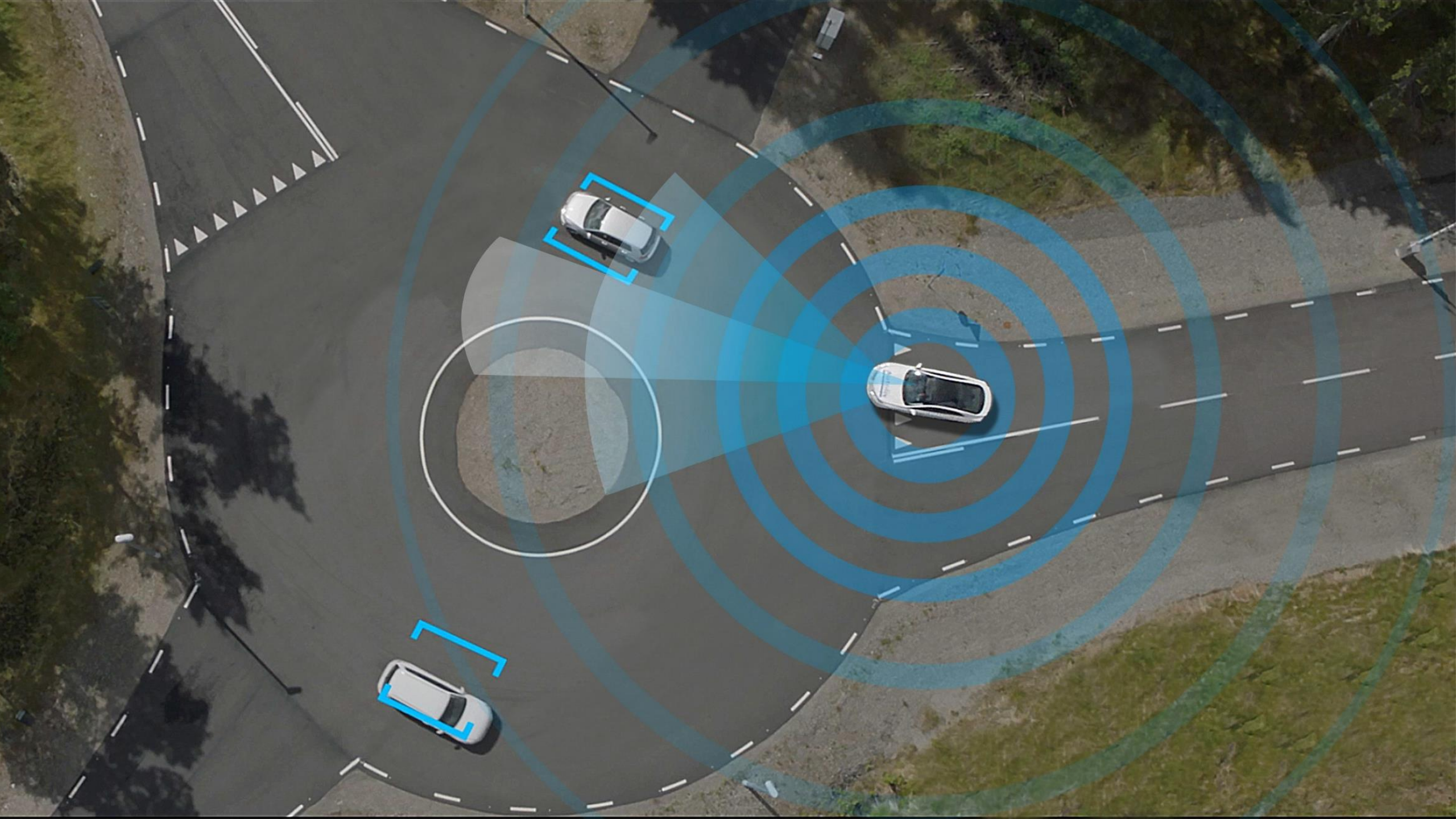


# Active Safety is an attractive market, with projected 2025 sales between \$21B - \$26B



Active Safety could be bigger than the Passive Safety market in 2025

Source: Bain



- 
- Market & Customer Insight
  - Research & Development
  - Cooperation

# LIV the Learning Intelligent Vehicle



Shared control between  
driver and vehicle

To attain trust required  
in autonomous driving

Connecting different  
technologies in an  
AI-based ECU



# A new role for M&A

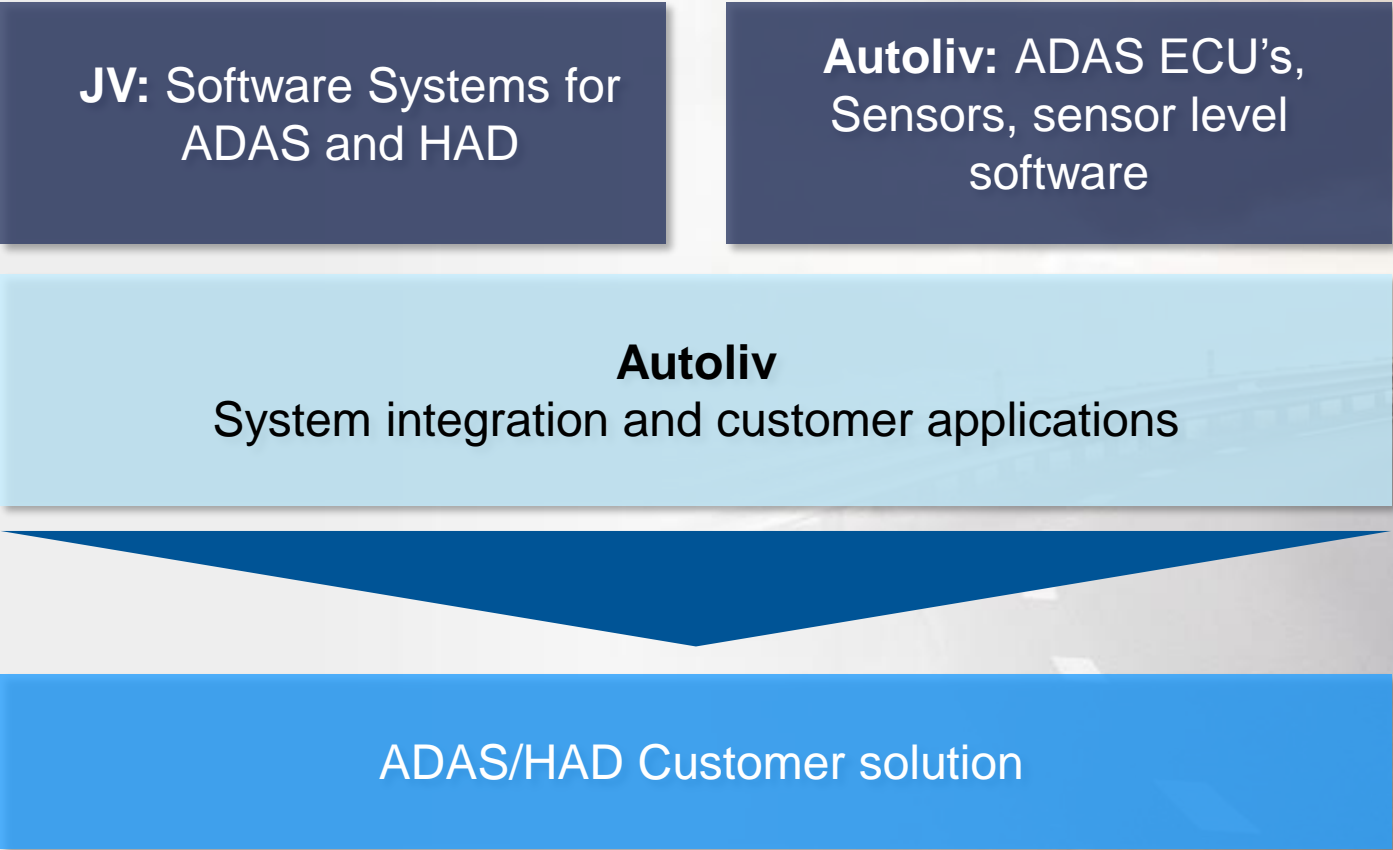
***tyco***

**MACOM™**

**Autoliv-Nissin**  
Brake Systems

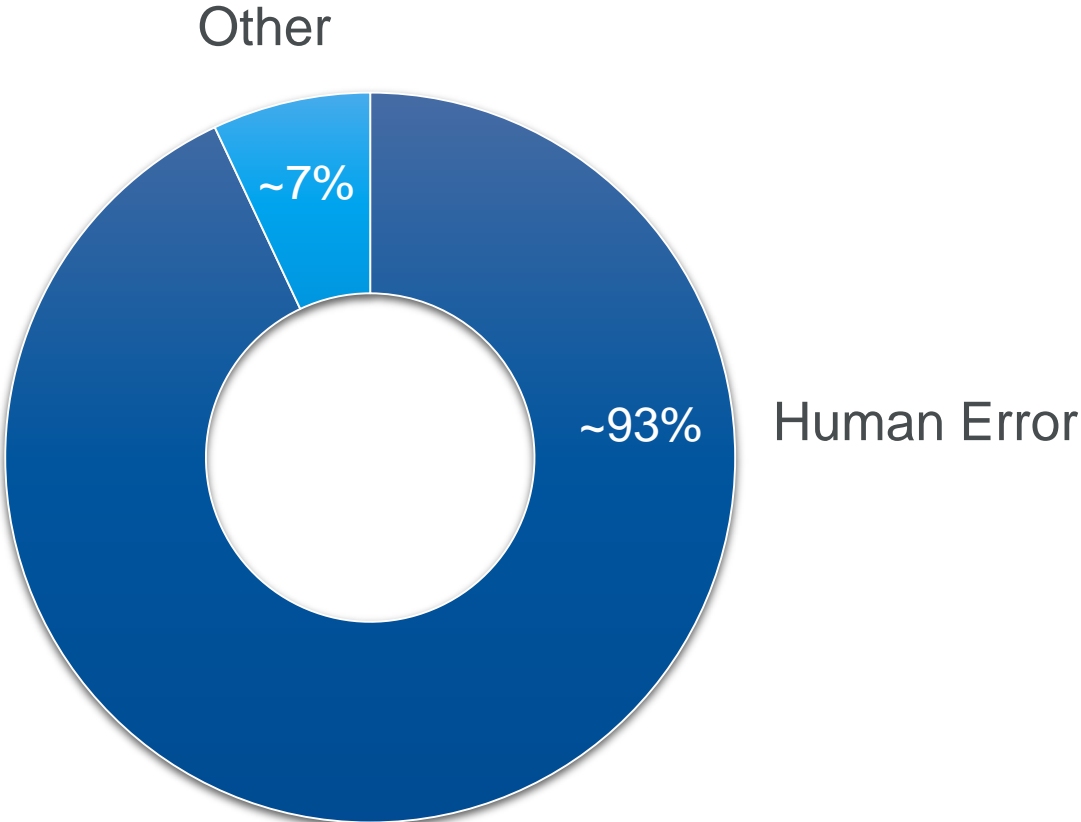
**Z E N U I T Y**

# JV Business Model



(\*) Non US GAAP, Net Debt adjusted to include Pension Liability

# Traffic Fatalities





- Quality
- Robustness
- User Experience

*Potentially \$25 B ADAS market in 2025*



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products save over  
30,000 lives

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