



# Customers and Market

Stephanie Jett

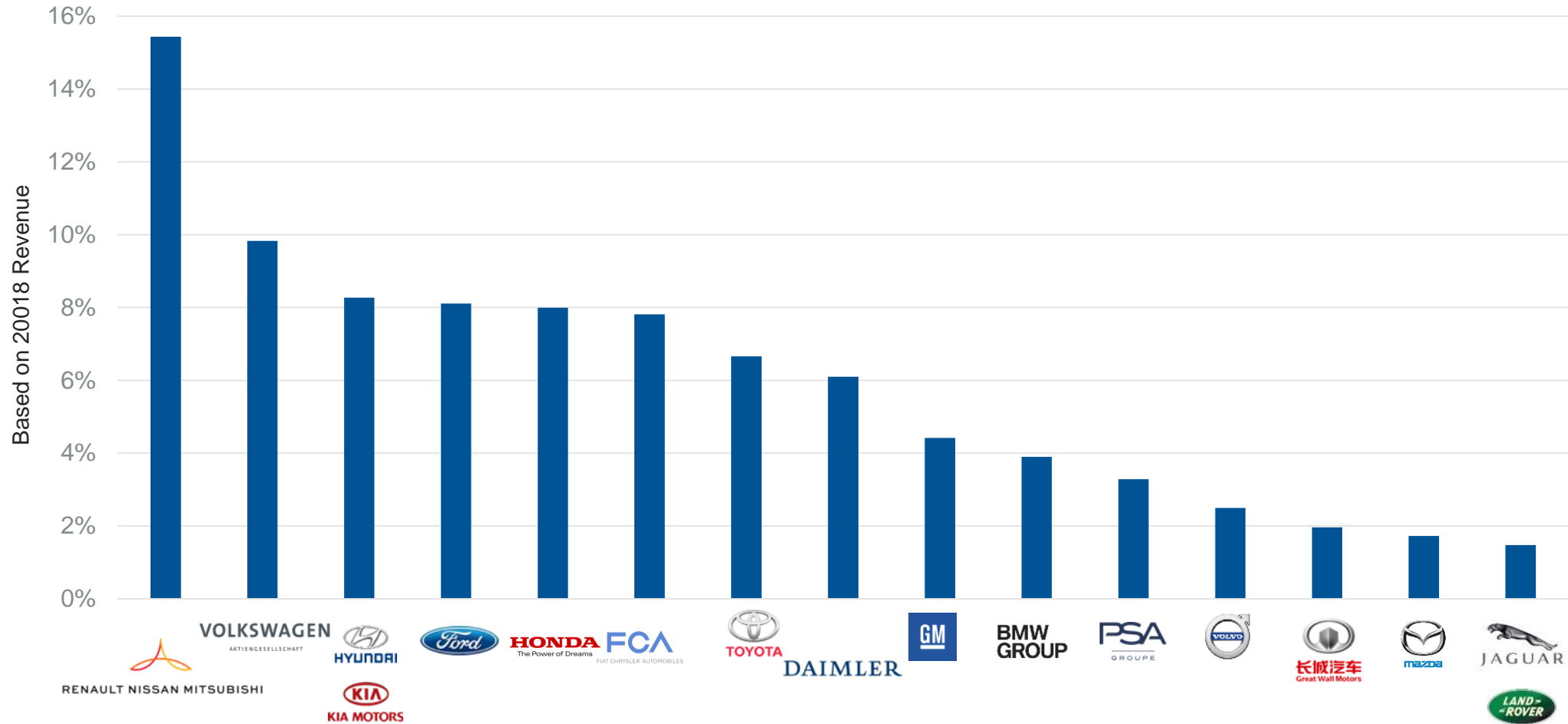
Senior VP Sales

Leading the Way  
Capital Markets Day 2019

**Autoliv**

# Well diversified customer mix

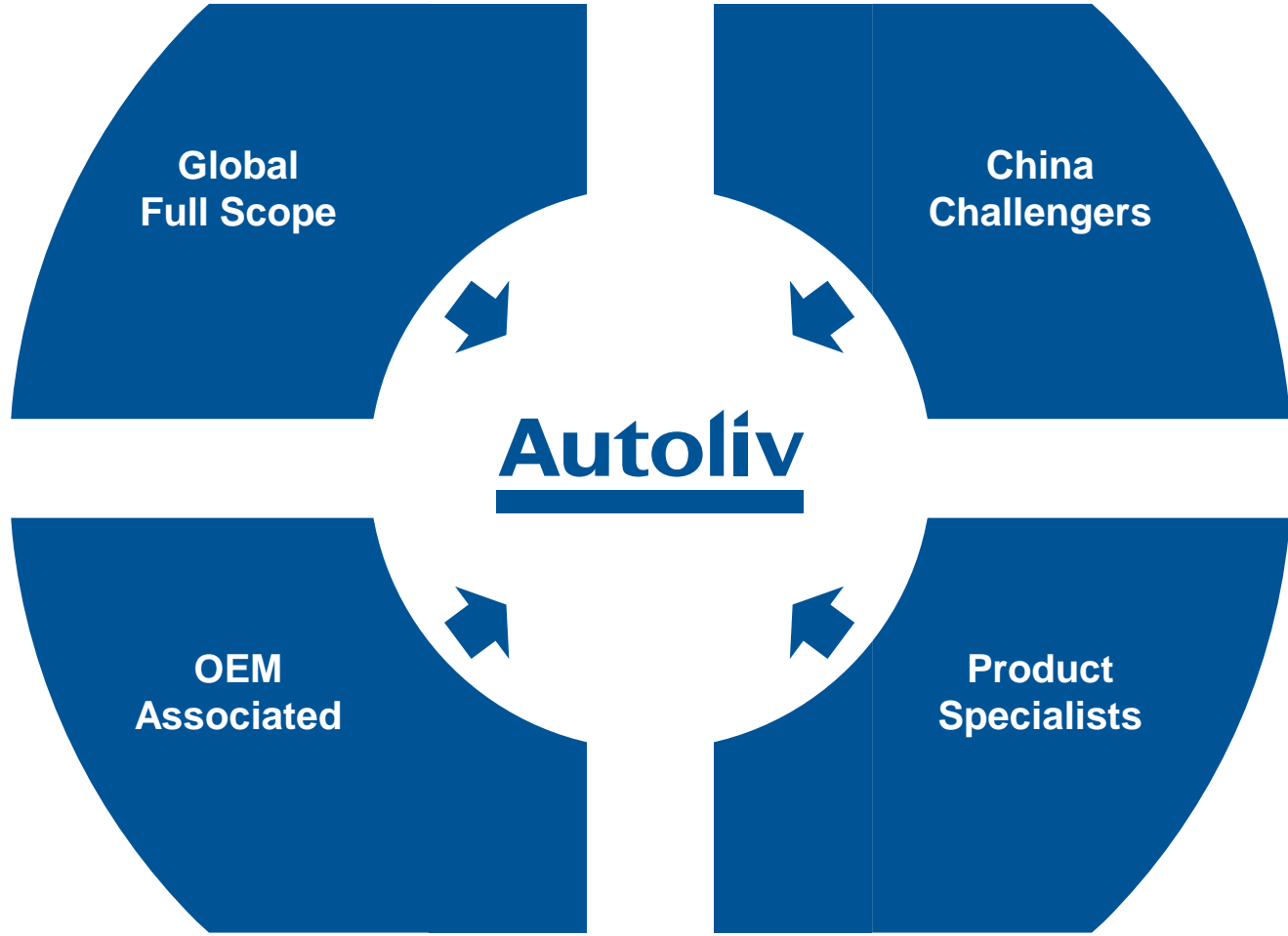
Serving All Major OEMs



Leading the Way

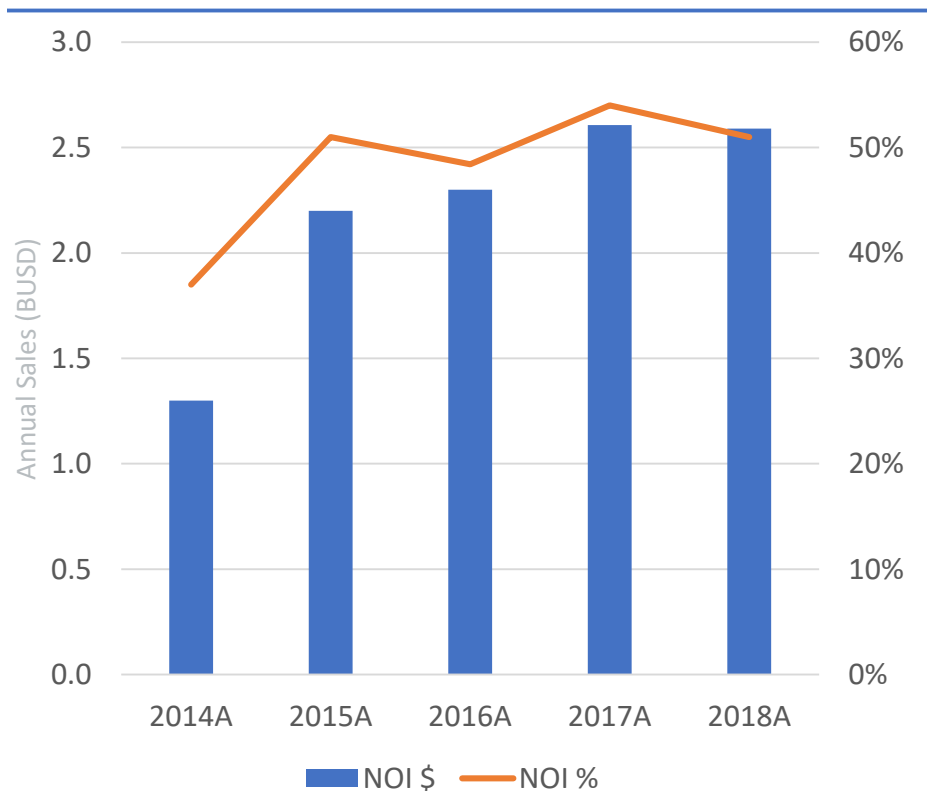
Capital Markets Day 2019

# Market: Competitive Landscape



# Proven Performance and Keen Focus to Differentiate

Order Intake Annualized Sales and Share



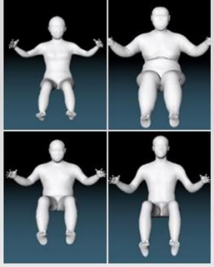



# Market Trends and Portfolio Evolution

## Market Trends

- Electric Powertrains
  - Electrical solutions
  - Lighter & Quieter
- HMI & HAD
  - Higher-content steering wheels
  - Remains a safety product with significant electronics content
- Safety Regulation Improvements
  - Rear seat occupants
  - Side pole crash
  - Pedestrians/ Vulnerable Road Users

## Autoliv Product Technology and Innovation Portfolio

|  |  |  |  |
|--|--|--|--|
| <b>Advanced driver-assistance systems (ADAS) &amp; Autonomous driving (AD)</b><br><br><b>New seating positions</b> <ul style="list-style-type: none"><li>✓ Safety solutions more complex: Need to adapt to new &amp; varying seating positions</li><li>✓ Safety integrated on seats</li></ul> <b>Human machine interface (HMI)</b><br>HMI driving Electrification of seatbelts and steering wheels | <b>Electrification</b><br><br><b>Main challenges: Weight &amp; noise</b> <ul style="list-style-type: none"><li>✓ New materials development</li><li>✓ Electrical solutions</li><li>✓ New quieter products</li><li>✓ Battery cut-off switches</li></ul> | <b>Adaptability to Size &amp; Age of Occupant</b><br><br><b>Adaptability of restraint systems</b> <ul style="list-style-type: none"><li>✓ Personalized restraint system</li><li>✓ Occupant diversity</li><li>✓ Child protection</li></ul> | <b>Vulnerable Road Users (VRU) &amp; others...</b><br><br><b>Protection of:</b> <ul style="list-style-type: none"><li>✓ Pedestrians, Cyclist</li><li>✓ Powered two-wheelers</li><li>✓ ...</li></ul> <b>VRU accounts for ~49% of all road fatalities</b> |
|--|--|--|--|

# Commercial Excellence: Transforming our Mission into a Reality

OUR VISION

**Saving More Lives**

OUR <sup>new</sup> MISSION

Providing world class life-saving solutions for mobility and society

OUR VALUES

One Autoliv  
Transparent  
Innovative  
Agile

The image consists of three vertical panels. The first panel shows a road stretching into the distance under a bright sun, with the text 'OUR VISION' and 'Saving More Lives'. The second panel shows a person climbing a large rock, with the text 'OUR new MISSION' and 'Providing world class life-saving solutions for mobility and society'. The third panel shows a person running on a path, with the text 'OUR VALUES' and 'One Autoliv, Transparent, Innovative, Agile'.

## ***Mobility & Society***

Core Business: LVP

Adjacent Markets

# True Market Leader in Safety: Mobility

Multi-modal view of transporting people, goods, and services, beyond the traditional market

## Mobility Safety Solutions

Leveraging our core expertise into saving more lives in new applications



### **VRU**

*Equates to 50% global fatalities*



### **Pyro-Safety**

*Technology Leverage*



### **Commercial Vehicle**

*New market, Existing products*



### **Digital Services**

*New service model*



### **Seat Safety Modules**

*Evolving end-user model*



Each year, Autoliv's  
products save over  
30,000 lives

[autoliv.com](http://autoliv.com)

**Autoliv**