



LEADERSHIP IN ADAS
DRIVING SAFER AND
SMARTER MOBILITY



SMART TECHNOLOGY FOR SMARTER MOBILITY

A Leader in ADAS

Most comprehensive sensor portfolio in the industry

Scalable system platforms with re-usable hardware and software modules



22,100
Employees



18
Countries



7,000

Research & Development



3,900

System & Software

VALEO RESERVED

2019 figures

1

1 in 4 new vehicles already come with a Valeo ADAS system

2

>11bn€ Order Intake over the past 3 years

3

1st Stand-Alone Level 2 based on camera-only technology

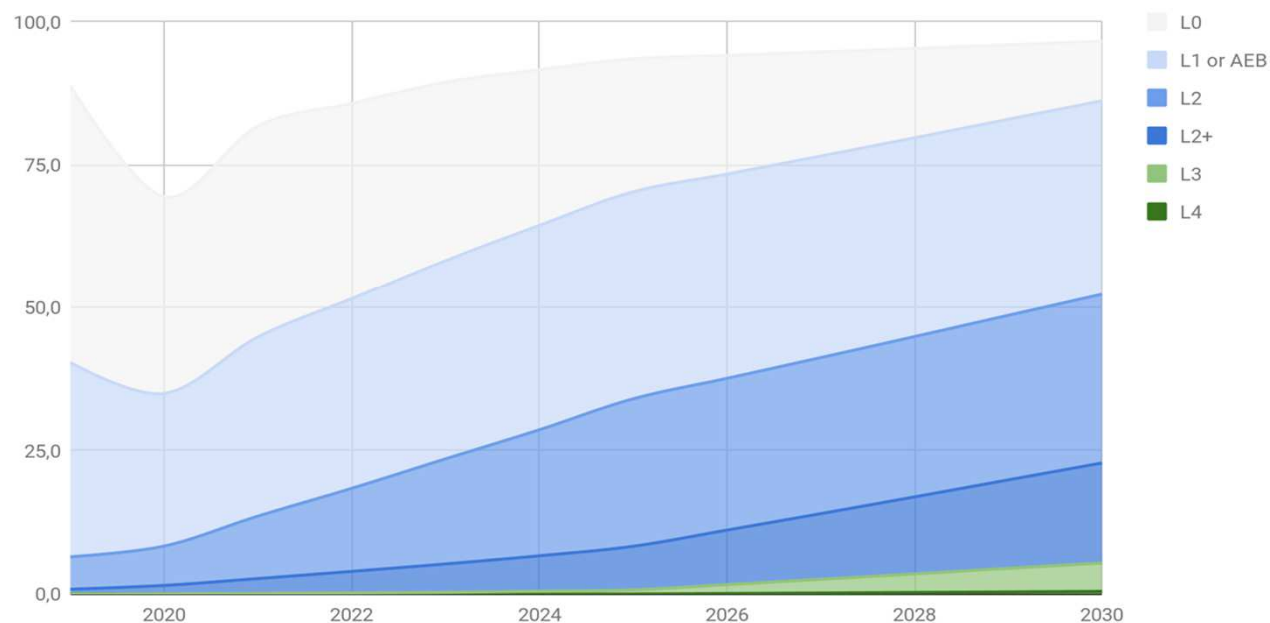
4

1st AI Driver Monitoring with driver distraction & drowsiness detection

Privately Operated Vehicles (POV) Drive Market Growth

- Safety first: Vision Zero
- ADAS is accelerating
- Privately-operated vehicles will focus on Level 2+
- Affordability drives up penetration rates and generates volumes

Vehicle Fitment per SAE Level



Amount of L2/+ systems for POV to quadruple by 2025

Driverless Vehicles focus on Commercial Services



- Transportation of people and goods will first adopt L4 automation
- Automation becomes a business case, rather than a customer feature
- Uncertainty of regulatory and liability frameworks slows broad deployment



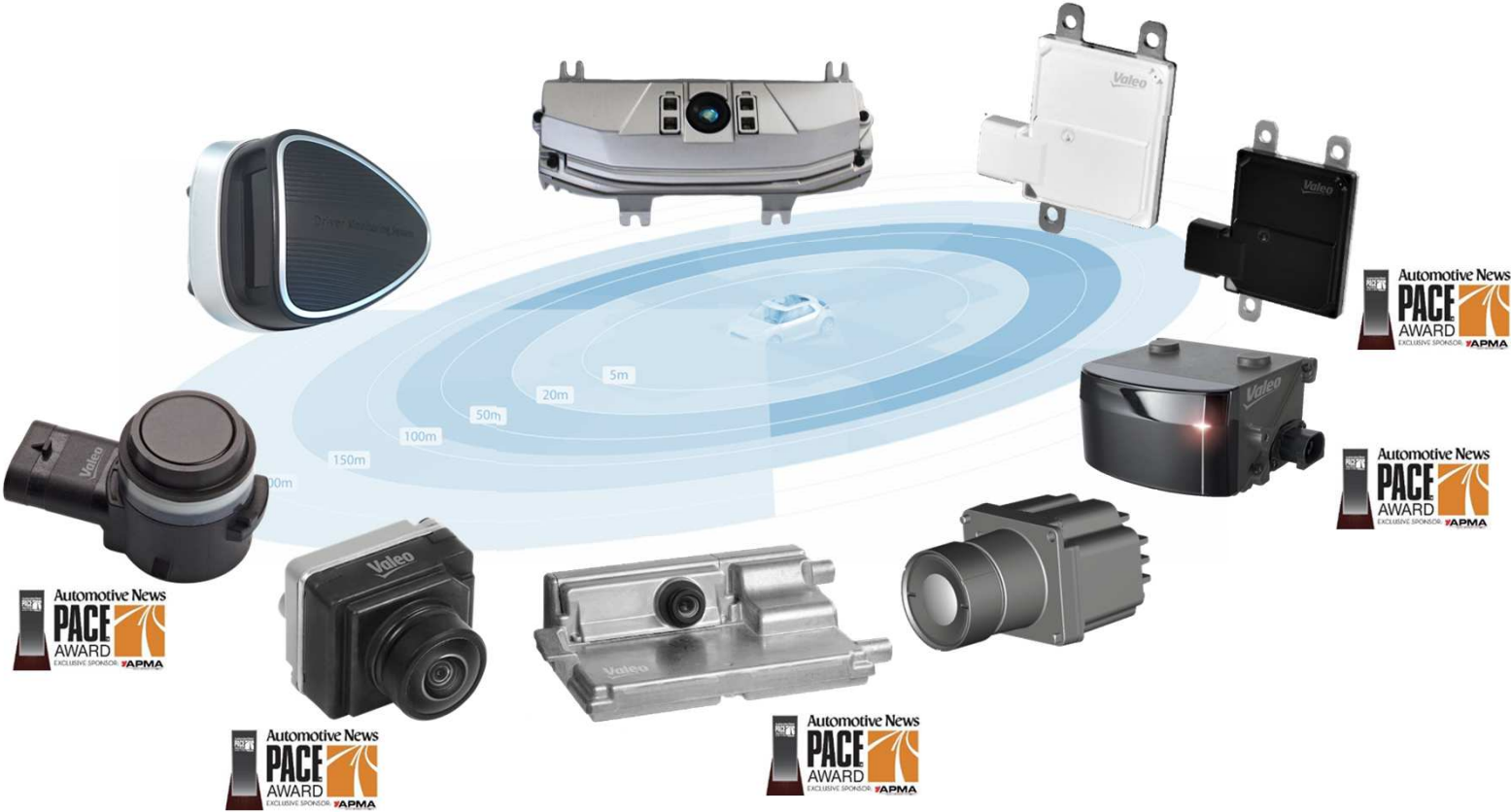
Platforms Generate Economies of Scale

INTERIOR COCOON

Driver and cabin monitoring

EXTERIOR COCOON

Perception and Situational Awareness



Valeo supports both pillars with our platforms for Automated, Connected, UX solutions

Powerful SOC's move the goalposts



- Silicon integration pushes chipmakers up the value chain
- We have built successful co-operations in the ADAS and Connectivity space
- We provide the broadest sensor portfolio in the market complemented by SW stacks



Established players in the western hemisphere...



... agile ecosystem / favourable government

Valeo has built global partnerships and local presence to add value as an integrator

Addressing New Value Spaces: Smart Mobility is More Than Cars

- **CES 2020 Demos:**
 - **eDeliver4U with Meituan**
 - **Mobility kit with TwinsWheel**
- **Cooperation with shuttle-makers**
- **Expand into cyber-services, localization, smart infrastructure etc.**



Credit: Valeo

Credit: Valeo



Credit: Navya



Credit: EasyMile



Credit: Scania



Credit: Valeo

30 YEARS OF VALEO INNOVATION IN ADAS

Ultrasonic Parking Aid 1991

Mirror-integrated Rain Sensor 1995

Programmable ASIC 1998

Lane-Departure Warning 2004

Multi-beam Radar 2006

Rain-Light-Humidity Sensor 2009

Cross Traffic Alert 2009

Perpendicular & Braking Park Assist 2010

Semi-automatic Park Assist 2007

Seamless Top View 2010

Rear Camera w/ distance overlay 2006

5-camera Surround View 2009

Parking Aid w/ flankguard 2011

Multi-function Front Camera 2015

3D Surround View w/ obj. detection 2015

Map-based Park Assist 2015

Hidden ultrasonic installation 2015

Parking Domain ECU 2016

Invisible Trailer rear view 2019

Automotive-grade 3D Laser Scanner 2017

Laser Scanner w/ increased vFoV 2020

Front Camera w/ 100° lens 2020

Camera design for high resolution 2021

New vision/fusion based features 2021

New Ultrasonic Sensor Interface 2021

THIS IS JUST THE BEGINNING

1 billion ADAS sensors in the last 30 years, another billion in the next 5 years