LEADERSHIP IN ADAS
DRIVING SAFER AND SMARTER MOBILITY
A Leader in ADAS

Most comprehensive sensor portfolio in the industry

Scalable system platforms with re-usable hardware and software modules

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

>11bn€ Order Intake over the past 3 years

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

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

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

“Tier-1 suppliers like Valeo are also helping us get up and going.”
(John Krafcik at IAA 2019)
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 SOCs 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.
30 YEARS OF VALEO INNOVATION IN ADAS

THIS IS JUST THE BEGINNING

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

Source: Valeo market estimation