



Taking Autoliv to the next level

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Leading the Way
Capital Markets Day 2019

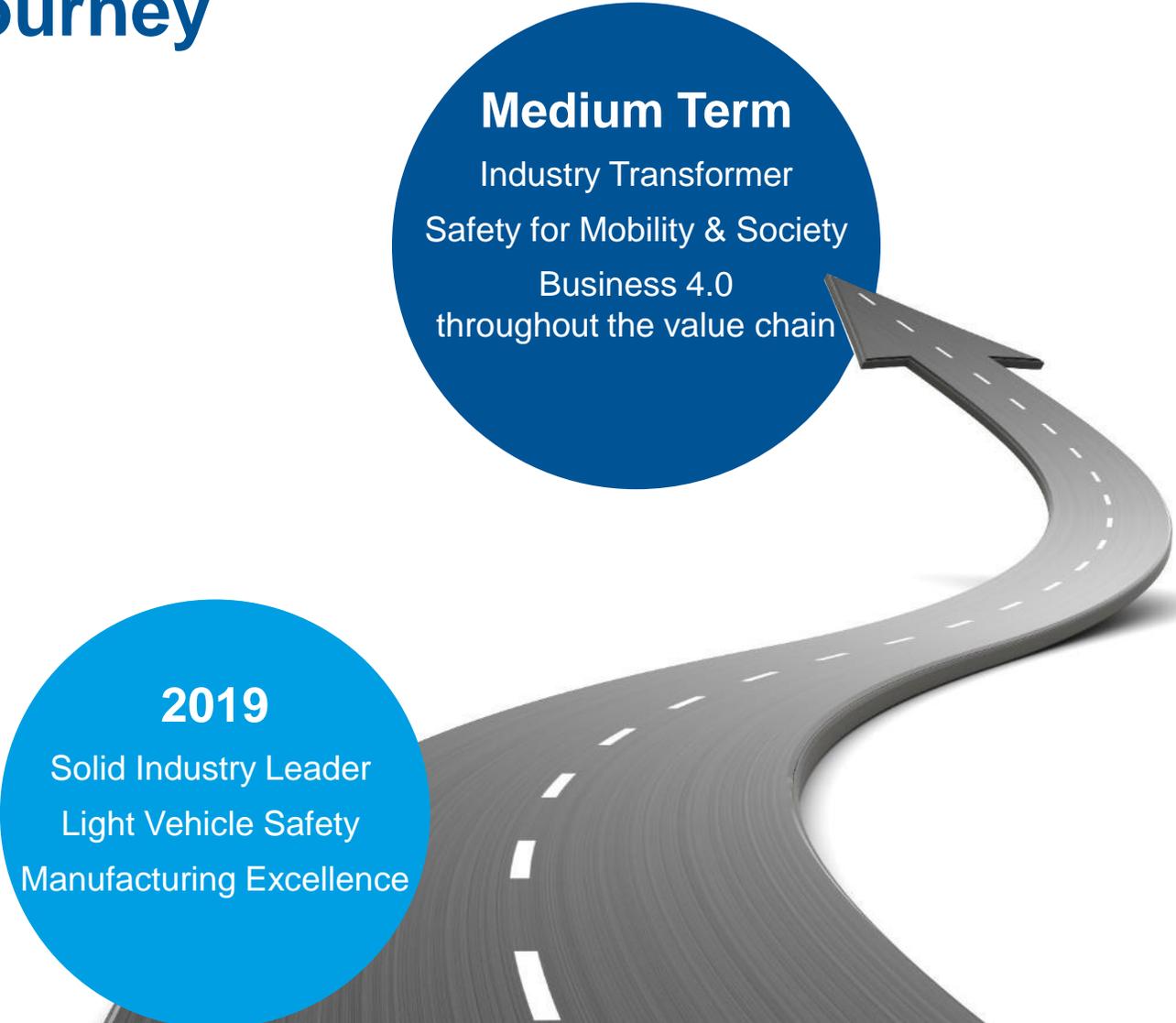
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() Non-US GAAP reconciliations are disclosed in our regulatory filings available at www.sec.gov or www.autoliv.com*

The Autoliv Journey



Medium Term
Industry Transformer
Safety for Mobility & Society
Business 4.0
throughout the value chain

2019
Solid Industry Leader
Light Vehicle Safety
Manufacturing Excellence

My vision for Autoliv for the medium term

We have taken the first steps into new markets

We have moved closer to saving 100,000 lives per year

We have further integrated sustainability with our day to day business

We have raised our level of profitability and cash generation

We are viewed as supplying best value by our customers

We will be well on our way in our automation journey

We have launched new products for AD, EVs, VRU and personalized restraints

We have strengthened our market position further through sales outperformance

We are the preferred development partner for our customers and suppliers

Profitable Growth always at the center of our focus

PROFITABLE ...

- **Volume Leverage**
- **Continuous Improvement**
- **Accelerators**
 - Automation
 - Digitalization
 - Modularization
 - Footprint & Review Make vs Buy
 - RD&E Effectiveness

**Agile
Governance Model
&
Performance
Culture**

...GROWTH

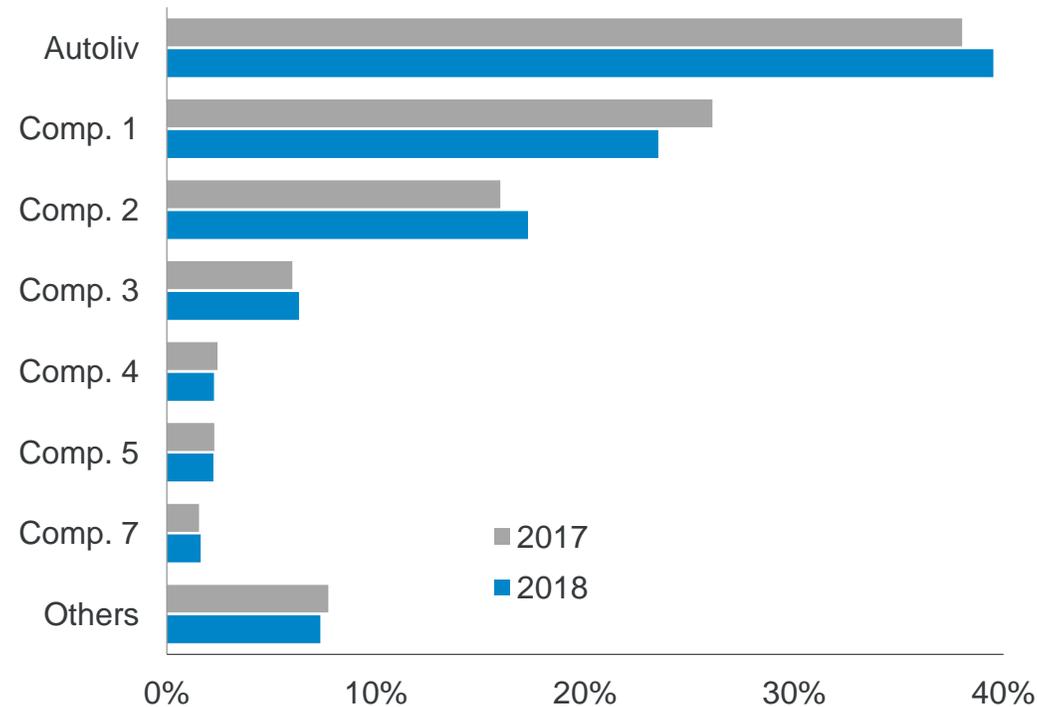
- **Core Business Growth**
 - Innovation
 - Quality Leadership
 - Customer & Business Management
- **New markets & Adjacent Business**

The image shows the front interior of a car. A large, deployed airbag is visible in the driver's seat area. The passenger seat is upholstered in a light-colored material with the 'Autoliv' logo embossed on the backrest. The center console and dashboard are visible in the background.

Customers and market position

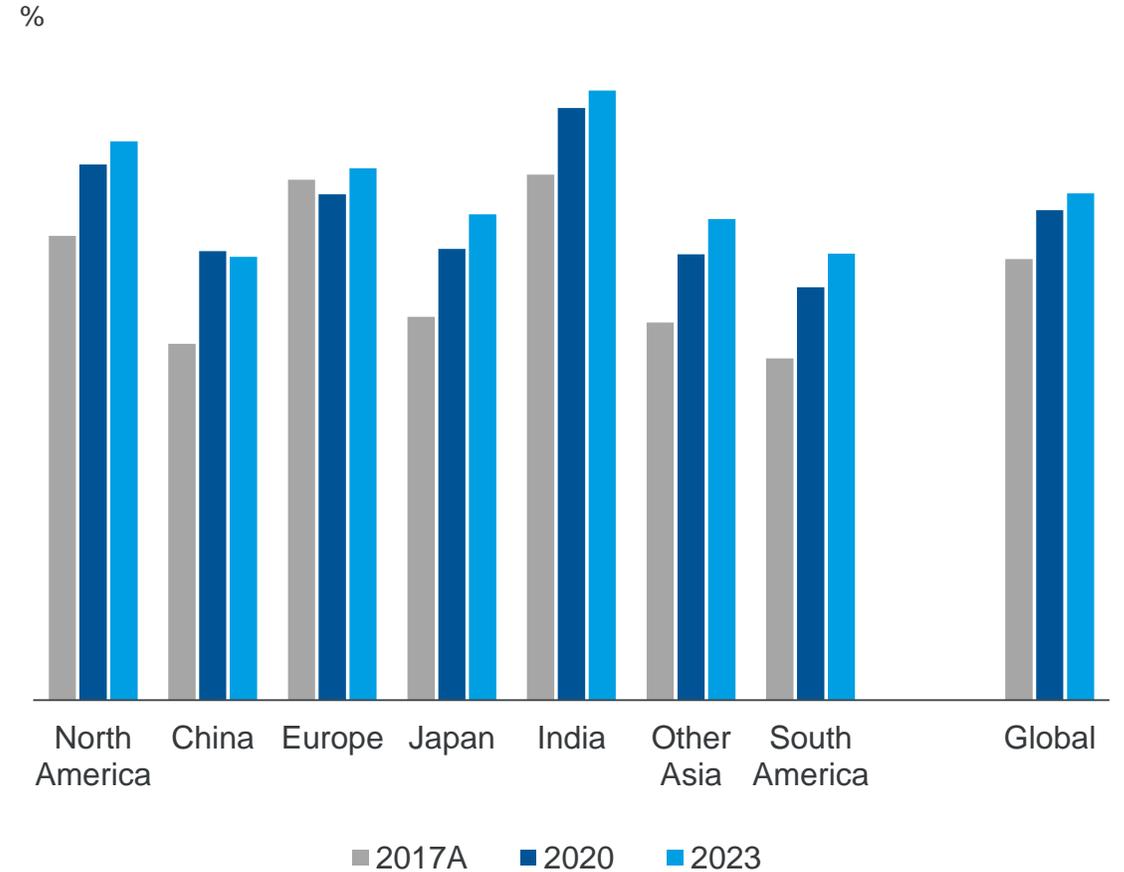
Strong starting point

Firm Industry Leader at 40%¹



(1) Company market estimates include seatbelts, airbags and steering wheels

Market Share by Geography ¹

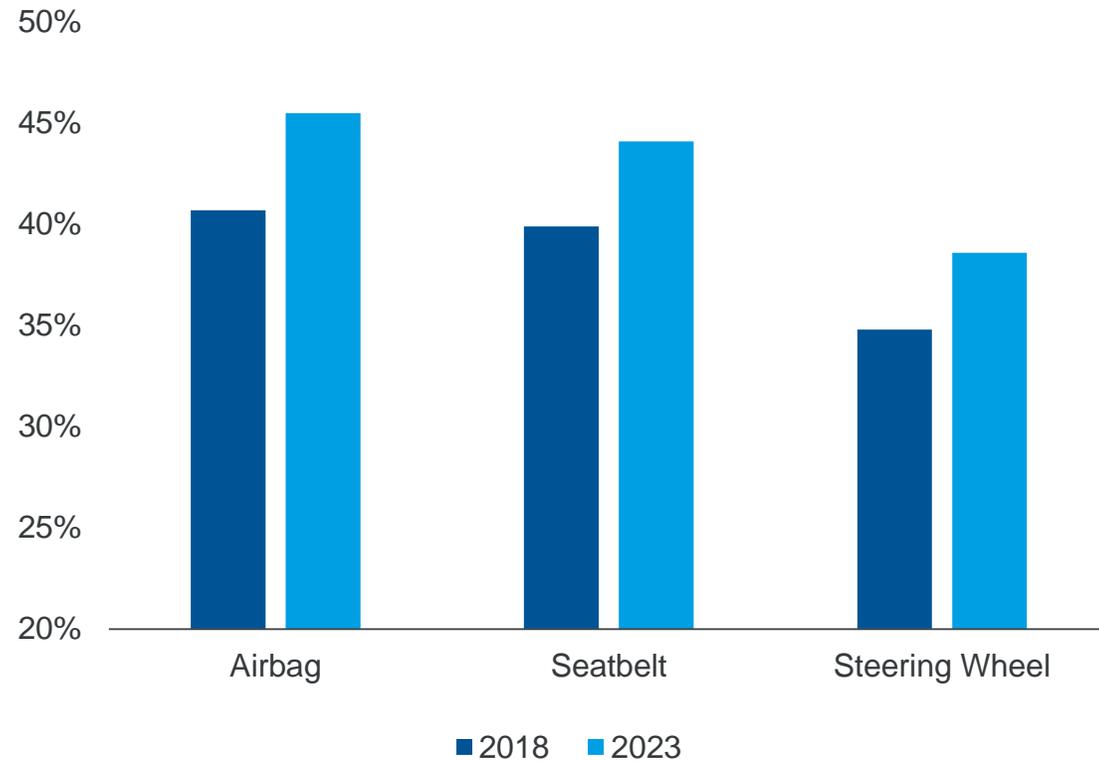


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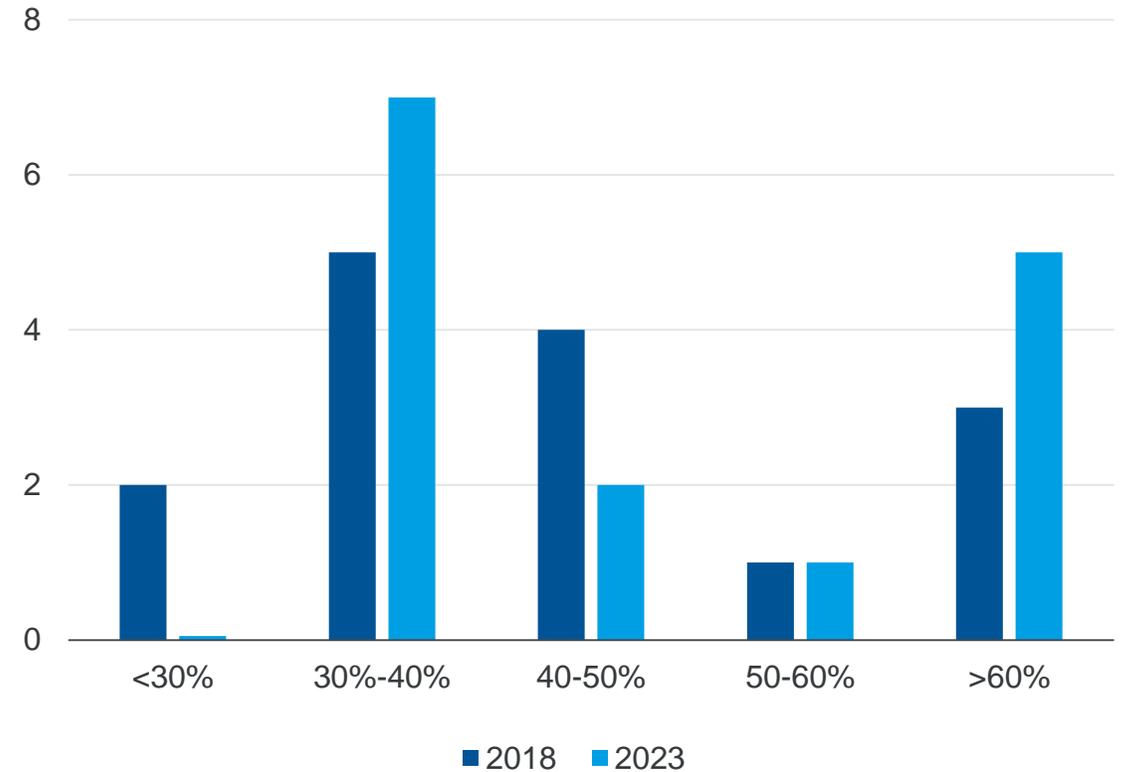
Strong starting point to improve further

Market Share by product category¹



(1) Company market estimates include seatbelts, airbags and steering wheels

Market share development with top-15 OEMs¹



Creating Sustainable Value – Our Commitment

From >30,000 lives saved today to 100,000 lives saved by 2030. That is our target.



This directly supports the UN Sustainable Development Goal no 3, Good Health and Well-being, and one of its' targets focused on reducing the number of global deaths and injuries from road traffic accidents by 50%.

Innovate Life-Saving Products

By staying at the forefront of technology, innovating and manufacturing high quality products, we save more lives in real-life traffic.

Limit our Impact on the Environment

Our commitment is to limit our environmental impact, particularly through reducing energy and water consumption, waste and emissions.



Commit to our Employees

We are committed to respecting human rights, diversity, and health & safety for our employees.

Act Ethically & Commit to Society

We believe in sound business practices and our actions are based on observance of ethical standards and engagement with communities where we operate. We expect our suppliers and business partners to act with the same level of integrity.



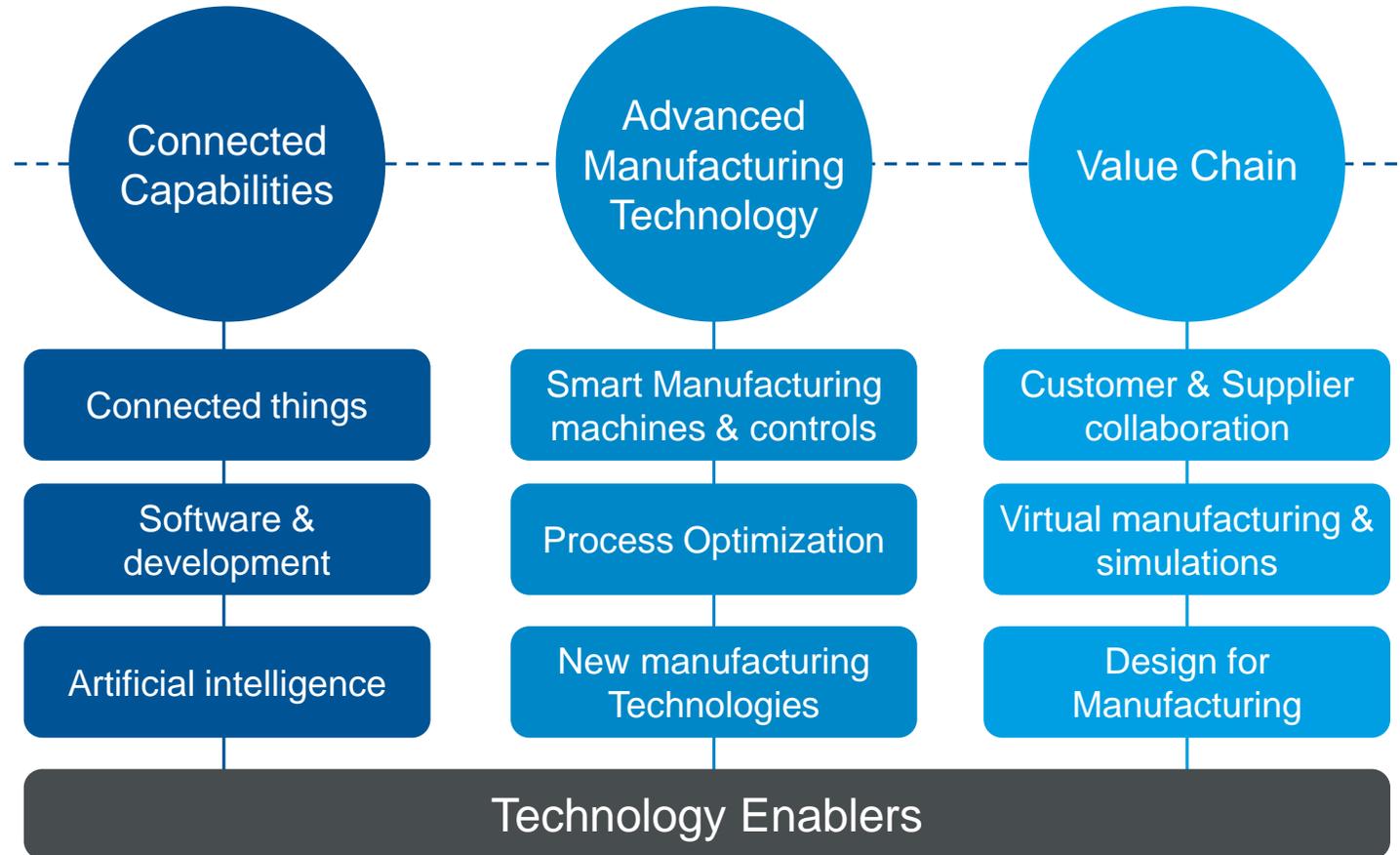
Step change in operational excellence

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Multi-dimensional end to end approach for sustainable improvement



Automation is a strategic priority for Autoliv

Main drivers

Demographics

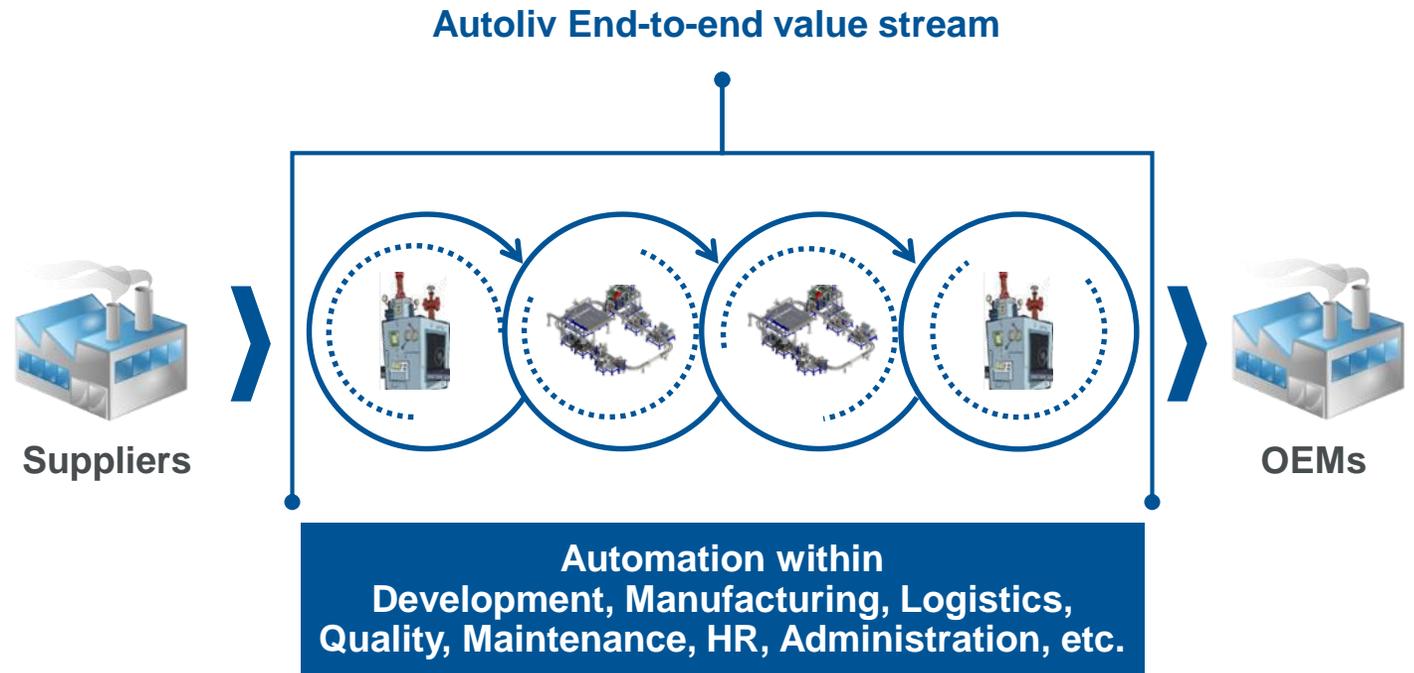
Growing shortage of manufacturing labor and labor cost increase

Business realities

Customer expectations on unit cost, precision, quality and robustness requirements

Technology evolution

Automation hardware e.g. robots, sensors, Industry 4.0 are becoming more cost effective and capable.



Factory of the future: automation across all areas

Applications

Processes and examples

Automation of Manufacturing Processes

- Value-add manufacturing processes; assembly as well as inspection processes
- Examples; robots, chaku-chaku, inspection systems



Automation of Material Handling – Logistics

- Material handling processes in warehouse and material flow end-to-end
- Examples; Automatic Intelligent Vehicles, automatic warehouses, automation scanning



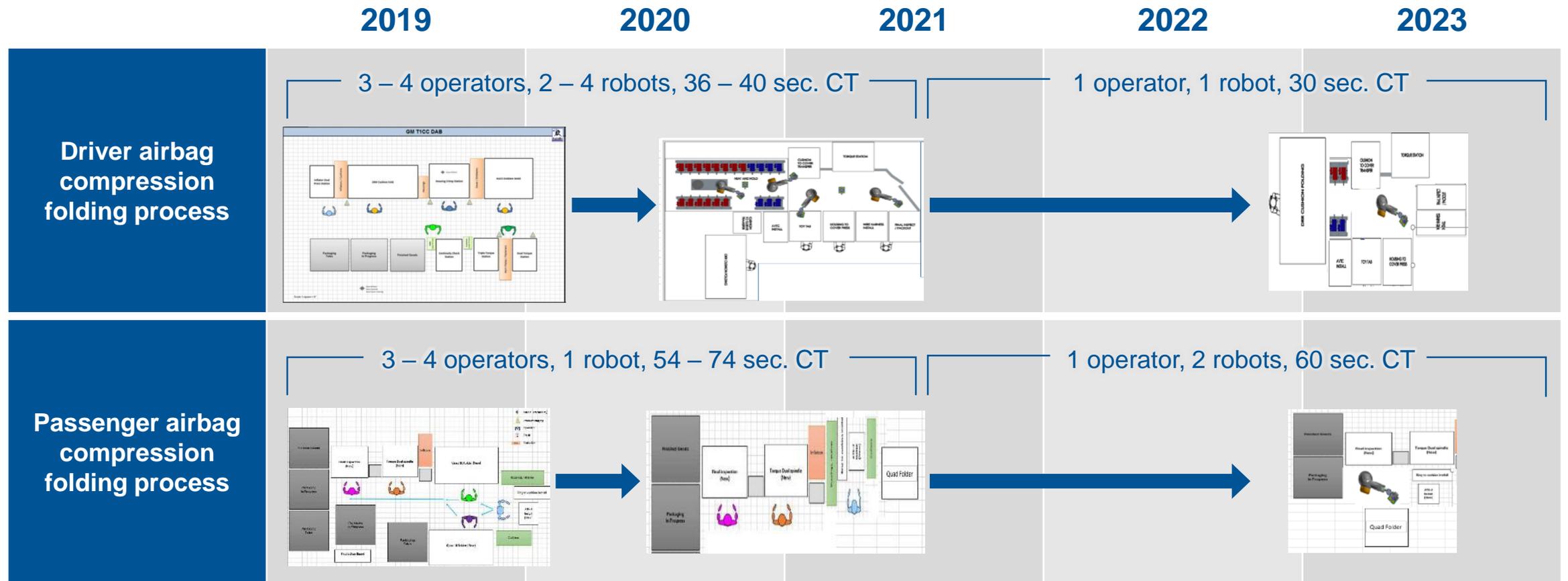
Automation of support processes e.g. quality, maintenance, admin

- Administrative robots
- Material / production planning, invoice handling, supplier batch data processing & traceability

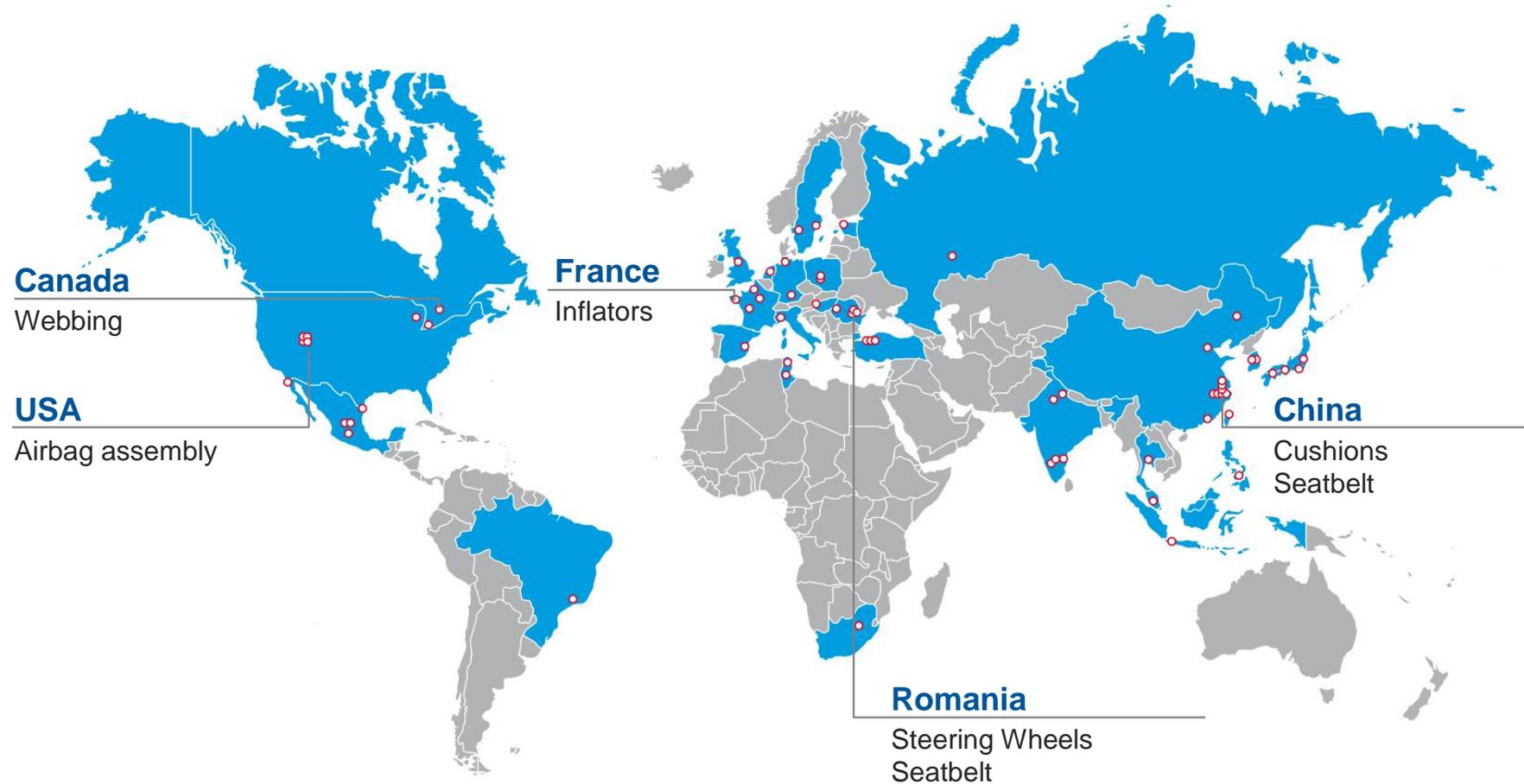


Factory of the Future

Example: automation of airbag manufacturing



Factory of the Future Implementation



Drive exploration, innovation & validation in Product Line specific Factory of the Future plants

Factory of the Future

Engineering 4.0 program

Efficiency through automation & simplification

- A Improve project time and efficiency
- B Drive 1 Product 1 Process (1P1P)
- C Reduce prototype and testing
- D Improve robustness and reduce risk



A close-up photograph of a car's interior, focusing on the driver's side. A white, perforated airbag is deployed from the steering wheel, partially obscuring the steering wheel and the instrument cluster. The car's dashboard, center console, and passenger seat are visible in the background. The overall color scheme is dark, with the white airbag providing a strong contrast.

Innovation, new markets and adjacent business

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R&D investments focused on key technology and product trends

ADAS & Autonomous driving



New seating positions & HMI

Electrification



Weight, noise and high voltage

Adapting to size & age



Flexible restraint systems

Vulnerable Road Users (VRU) & others...



Broadened protection scope

Co-ordinated product and process roadmaps for top and bottom line optimization

Product Roadmap – Seat Belts

Retractor		Start of Production (SOP)
Pretensioner		5 Product modules SOPs
T-bar pretensioner		6 product modules SOPs
Buckle		4 product SOPs
Pyrotechnic linear / buckle pretensioner PLP / PBP		Pyrotechnic linear pretensioner SOP
Crash Locking Tongue		3 product SOPs

Seat Belts Process Roadmap

	2019	2020	2021	2022	2023
Retractors:					
R200.2x R230.x R27	Semi-Autom. LCC & HCC. R200.2x R230.x R27	TCVSM optimized R200.2RP auto. Retro	TCVSM optimized	I4.0 optimized R200.2RP auto. (TCVSM & I4.0 opt.)	I4.0 optimized
Buckles:					
K12S K12E K12TPC	Manual all K12x (LCC) Semi-Autom. K12S (HCC)	TCVSM optimized	I4.0 optimized	I4.0 optimized (LCC/HCC)	
Height adjuster:					
HA70	Manual (LCC) Automatic (HCC)	Higher efficiency due to VSM & TC	Manual to Auto	Full Auto	New Product? New Process?
Main Subassemblies:					
	Manual (HCC & LCC)	TC optimized			
Belt finishing line PPMI	Automatic (HCC)		I4.0 optimized & ex. placed in AMM		

Examples of products driven by the automotive megatrends

	2019	2020	2021	Future	
Advanced driver-assistance systems (ADAS) & Autonomous driving (AD)	 <p>HMI driving Electrification of seatbelts and steering wheels</p>				 <p>Safety integration in seats</p>
Electrification		 <p>Electrical Car Sensor (eCS) / PPMI</p>			 <p>Fully Electric Retractor</p>
Adaptability to Size & Age of Occupant			 <p>3 Stage Adaptive Load Limiter (LL3)</p>		 <p>Fully Electric Retractor (Multiple Load levels)</p>
Vulnerable Road Users (VRU) & others...	 <p>Pedestrians and cyclist PPA</p>				 <p>Motorcycle / Scooter Airbags</p>

Adjacent opportunities

Mobility Safety Solutions opportunities

VRU



- Pedestrian Protection
- Cyclist Protection
- Wearables

Pyro-Safety



- EVs
- Non-automotive

Commercial Vehicle



- Core Products
- Medium/Heavy Duty

Digital Services



- Safety Score

Seat Safety Modules



- Integrated Child Booster
- Child Seat Restraints





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

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