



Saving more lives

Post Q2'15 Earnings Non-Deal Roadshow Boston, NYC

Jan Carlson – Chairman, President & CEO
August 5-6, 2015



Copyright Autoliv Inc., All Rights Reserved

Safe Harbor Statement*

This presentation contains statements that are not historical facts but rather forward-looking statements within the meaning of the Private Securities Litigation Reform Act of 1995. Such forward-looking statements include those that address activities, events or developments that Autoliv, Inc. or its management believes or anticipates may occur in the future. All forward-looking statements, including without limitation, management's examination of historical operating trends and data, as well as estimates of future sales, operating margin, cash flow, effective tax rate or other future operating performance or financial results, are based upon our current expectations, various assumptions and data available from third parties. Our expectations and assumptions are expressed in good faith and we believe there is a reasonable basis for them. However, there can be no assurance that such forward-looking statements will materialize or prove to be correct as forward-looking statements are inherently subject to known and unknown risks, uncertainties and other factors which may cause actual future results, performance or achievements to differ materially from the future results, performance or achievements expressed in or implied by such forward-looking statements. Because these forward-looking statements involve risks and uncertainties, the outcome could differ materially from those set out in the forward-looking statements for a variety of reasons, including without limitation, changes in global light vehicle production; fluctuation in vehicle production schedules for which the Company is a supplier, changes in general industry and market conditions or regional growth decline, changes in and the successful execution of our capacity alignment, restructuring and cost reduction initiatives and the market reaction thereto; loss of business from increased competition; higher raw material, fuel and energy costs; changes in consumer and customer preferences for end products; customer losses; changes in regulatory conditions; customer bankruptcies, consolidations, restructurings or divestiture of customer brands; unfavorable fluctuations in currencies or interest rates among the various jurisdictions in which we operate; component shortages; market acceptance of our new products; costs or difficulties related to the integration of any new or acquired businesses and technologies; continued uncertainty in pricing negotiations with customers, our ability to be awarded new business; product liability, warranty and recall claims and investigations and other litigation and customer reactions thereto; higher expenses for our pension and other postretirement benefits including higher funding requirements for our pension plans; work stoppages or other labor issues; possible adverse results of pending or future litigation or infringement claims; negative impacts of antitrust investigations or other governmental investigations and associated litigation relating to the conduct of our business; tax assessments by governmental authorities and changes in our effective tax rate; dependence on key personnel; legislative or regulatory changes limiting our business; political conditions; dependence on and relationships with customers and suppliers; and other risks and uncertainties identified under the headings "Risk Factors" and "Management's Discussion and Analysis of Financial Condition and Results of Operations" in our Annual Reports and Quarterly Reports on Forms 10-K and 10-Q and any amendments thereto. The Company undertakes no obligation to update publicly or revise any forward-looking statements in light of new information or future events. For any forward-looking statements contained in this or any other document, we claim the protection of the safe harbor for forward-looking statements contained in the Private Securities Litigation Reform Act of 1995, and we assume no obligation to update any such statement.

(*) Non-US GAAP reconciliations are disclosed in our 8-K/10-K/10-Q filings available at www.sec.gov or www.autoliv.com.

Q2'15 Highlights

Sales growth in line, margins better than expected

■ Financial Performance

- Organic sales* growth 6.1%, vs. an LVP decline of 0.3%
- Operating margin* 9.5%, ~ 50 bps better than expected
- EPS* \$1.62, 12% better than PY
- Operating cash flow \$154M
- RoCE* ~ 24%, RoE* ~ 17%

■ Shareholders returns and Capital Structure

- Record dividend \$0.56 per share
- \$49M returned to shareholders

■ Active Safety

- Organic sales* growth ~ 26%
- Expanding capabilities through acquisitions

● Strong product and geographic diversification supporting solid financial performance.

(*) Non-US GAAP measure, Earnings per share (fully diluted), Return on Capital Employed and Return on Equity exclude costs for capacity alignments and antitrust matters, Light Vehicle Production according to IHS @ July 16, 2015.

Enhancing our Growth and System Capability Thru Strategic M&A

■ Entered into an IP license with Volvo Car Corporation (VCC)



- Provides access to advanced driver assistance algorithms and certain active safety features (ex. ACCPlus, emergency maneuver and intersection assist, sensor fusion).

➤ In combination with Autoliv's own algorithms, sensors and control systems this strengthens Autoliv's overall safety system integration capabilities

■ Acquired MACOM's "Automotive Solutions" Business



- 25 employees, annual sales ~ \$90M, margin accretive upon closing
- GPS* module, Electronic Horizon, other related RF* products and IP*

➤ Additional building blocks towards automated driving

🔗 Expanding our capabilities and feature-set towards automated driving.

(*) Global Positioning System, Radio Frequency, Intellectual Property.

Strong Performing Models

Contributing to solid organic sales* growth in Q2'15

Mercedes C-Class



Hyundai Tucson/ix35



Mercedes B-Class



Acura TLX



KIA Sorento



Ford Escort



VW Passat



Baojun 730



Land Rover Discovery Sport



🟡 Active Safety organic sales* growth ~ 26% in Q2'15.

(*) Non-US GAAP measure.

Strong Volume Growth

Unit growth exceeds LVP in all product areas

Autoliv Quantities Delivered (Millions unless specified)	Q2'15	vs. PY
Seatbelts	37.2	2%
• Pretensioners (of which)	15.2	1%
• Active Seatbelts (of which)	0.8	18%
Frontal Airbags	12.4	8%
• Knee Airbags (of which)	1.5	12%
Side Airbags	23.0	6%
• Chest (Thorax)	12.4	6%
• Head (Curtain)	10.6	7%
Steering Wheels	4.2	6%
Electronic Control Units	4.7	6%
Active Safety Sensors	1.6	39%
LVP* TRIAD	10.1	0.2%
LVP* GLOBAL	21.7	(0.3)%

🟡 Strong volume growth in all product areas

(*) Light Vehicle Production according to IHS @ July 16, 2015, TRIAD (WEU, North America, Japan).

Light Vehicle Production

Q2'15

Vehicles in millions	2015	2014	2015 vs. 2014		ALV Organic * Growth
			@ Jul 16	@ Apr 16	
Americas	5.3	5.4	(1)%	1%	8.2%
North America	4.5	4.4	2%	3%	
South America	0.8	1.0	(17)%	(5)%	
Europe	5.4	5.3	0%	(2)%	8.0%
Western Europe	3.7	3.5	4%	2%	
Eastern Europe	1.7	1.8	(7)%	(9)%	
Asia	10.5	10.6	(1)%	2%	1.9%
Japan	1.9	2.2	(11)%	(8)%	2.0%
China	5.5	5.4	2%	9%	(3.1)%
RoA	3.1	3.0	1%	(2)%	10.2%
Other *	0.5	0.4	11%	(10)%	
Total Global	21.7	21.7	(0.3)%	0.7%	6.1%

📉 Q2'15 LVP sequentially decline from Q1'15 0.5M.

Source: IHS @ July 16, 2015 & Apr 16, 2015, (*) Middle East/ Africa, (*) Non-US GAAP Organic Sales Growth.

Market Conditions

Increasing uncertainty in the macro environment

■ Asia

- Slowing growth in China with increasing inventories, LVP increase ~ 5% for H2'15
- Japan LVP is expected to decline ~ 2% for H2'15
- RoA LVP growth of ~ 4% for H2'15, driven by India and Thailand

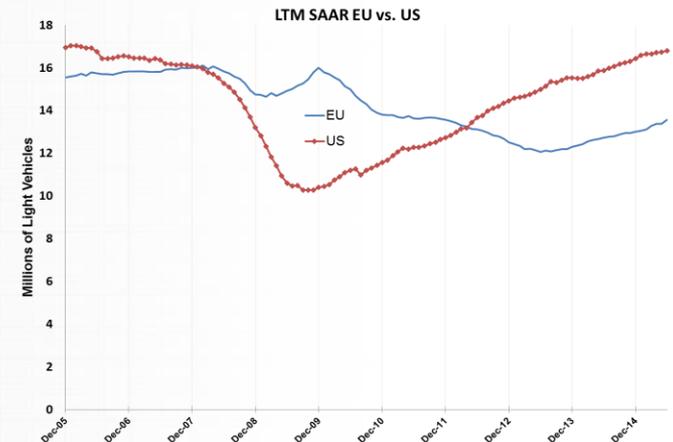
■ Americas

- Stable US SAAR around 17M with reasonable inventories** ~ 60 days
- North America LVP increase ~ 4% for H2'15
- South America LVP no signs of a real recovery

■ Europe

- EU27** vehicle registrations continue to steadily recover while EEU LVP declines YoY continue
- LVP is expected to slightly increase ~ 2% for H2'15

FY'15 LVP * @ July. 16, 2015		
Region	Vehicles (Mil's)	YoY Chg.
China	22.9	+5%
Japan	8.5	(6)%
RoA	12.4	+2%
North America	17.5	+3%
South America	3.2	(15)%
Europe	20.5	+2%
Global	87.2	+1.8%



🚗 LVP* is expected to increase YoY 2.4% in H2'15 but decline sequentially 1.5% from H1'15

(*) Light Vehicle Production according to IHS @ July 16, 2015, (**) Source: ACEA & Ward's Auto.

China Market Uncertainty Increasing

Light vehicle growth is slowing



■ Market driven

- YTD'15 LVP growth rate is slowing
- Negative inventory trend over the last 18 months
- Many customers extending summer downtime or reducing shifts

■ ALV specific

- Negative vehicle mix including model transitions
- Strong growth with several COEMs, however lower volumes expected on FY'15 launches

■ ALV actions

- Maintaining vertical integration strategy to support long-term LVP* and CPV* growth
- Continued engineering efforts in both Passive and Active safety
- Tightened cost control to mitigate the margin effects of lower growth

🟡 Despite uncertainties and market volatility, we remain confident in our long-term growth prospects for China

(*) Light vehicle production and content per vehicle.

Business Segment Update

During the last twelve months

■ Passive Safety

■ Inflator replacement program

- Current best estimate is to supply up to 20 million inflators
- Increase in new business awards for frontal airbags

■ Electronics

■ Expanding customer base, 43 model awards

■ System award with a new global customer

■ 2015 new product / technology launches

- Vision, radar and safety domain ECU*
 - solid business beyond current serial production contracts
- Significant OEM interest in our stereo and mono vision offerings
 - functions include AEB*, LKA*, Pedestrian Detection, Free Space / Road Surface

🚗 Building on our strong global customer reach and broad product offering in Passive and Active Safety

(*) Last Twelve Months, Electronic Control Unit, Autonomous Emergency Braking, Lane Keep Assist.

Q2 Financial Overview

Solid financial performance

(US\$ Million's unless specified)	2015	2014
Sales	\$2,292	\$2,383
Gross Profit	\$460 20.1%	\$464 19.5%
Operating Income*	\$217 9.5%	\$221 9.3%
EPS* (assuming dilution)	\$1.62	\$1.45
RoCE*	24%	25%
RoE*	17%	14%
Operating Cash flow	\$154	\$86
Dividend**	\$0.56	\$0.52
GLVP*** (annual run rate)	~ 86.7M	~ 86.9M

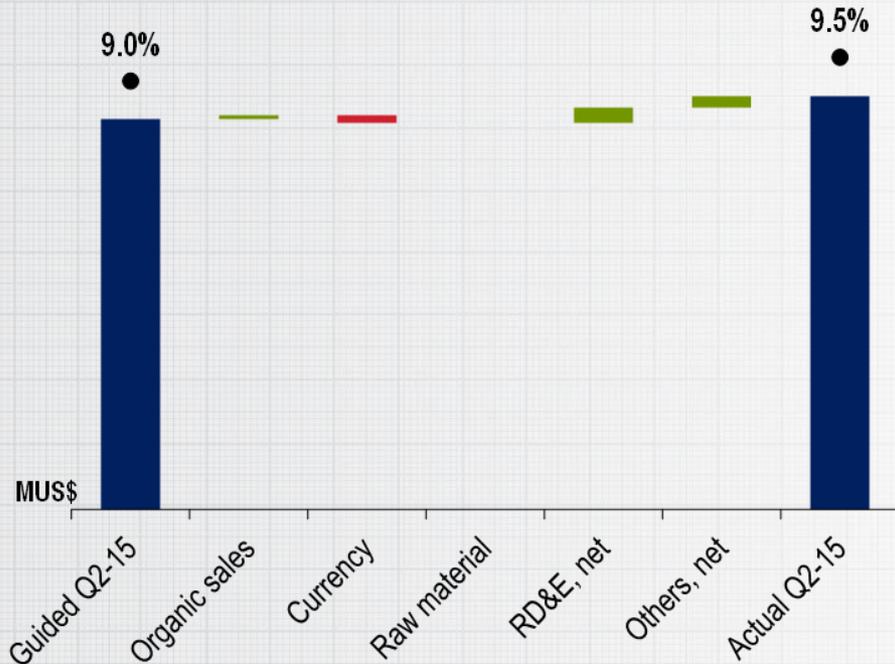
🟡 Q2'15 currency translation effect on sales ~ (\$237)M

(*) Non-US GAAP, Earnings per share, Return on Capital Employed and Return on Equity exclude costs for capacity alignments and antitrust matters,
 (**) Dividend paid per share, (***) Global Light Vehicle Production according to IHS @ July 16, 2015.

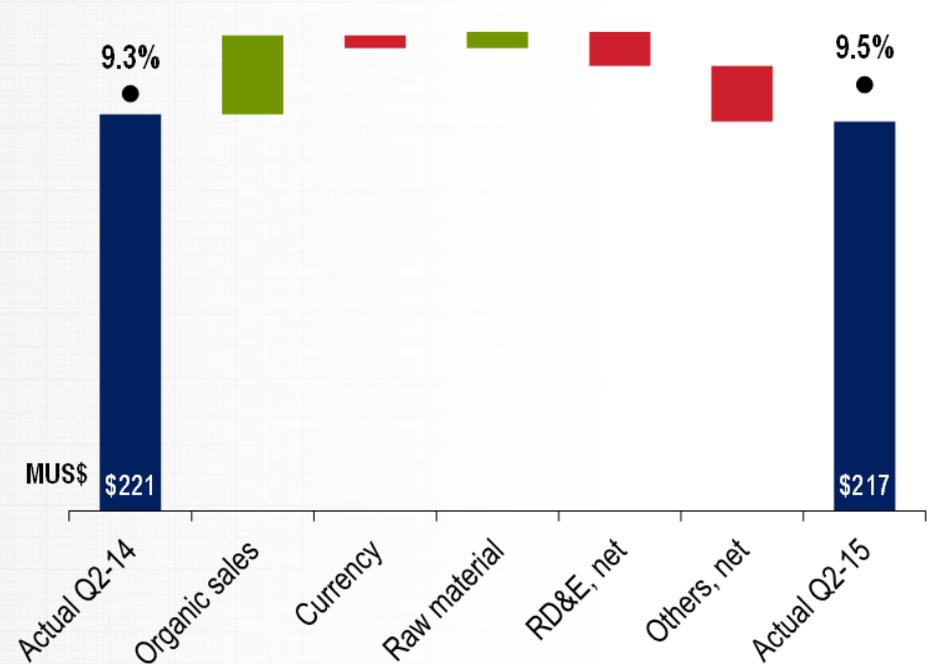
Operating Income and Margin* Bridge

Q2'15 vs. Guidance and Prior Year

Q2'15 vs. Guidance (50 bps better)



Q2'15 vs. Prior Year (20 bps better)



🟡 Operating Margin* 9.5%.

(*) Non-US GAAP measure, excludes costs for capacity alignments and antitrust matters.

Cash Flow

Investments for growth in CapEx and shareholder returns

(US\$ Million's unless specified)	Q2 2015	Q2 2014	LTM	FY 2014	FY 2013	FY 2012	FY 2011
Net Income	137	83	427	469	490	486	627
Depreciation & Amortization	76	77	304	305	286	273	268
Other, net	4	5	27	42	43	10	38
Change in operating WC *	(63)	(79)	(83)	(103)	19	(80)	(175)
Operating cash flow	154	86	675	713	838	689	758
Capital Expenditures, net	(109)	(115)	(483)	(453)	(379)	(360)	(357)
Free cash flow **	45	(29)	192	260	459	329	401
Dividend payment	49	48	195	195	191	178	154
Share repurchase	0	97	529	616	148	0	0

📌 Shareholder returns of \$49M during Q2'15.

(*) Non US GAAP measure, (**) Non-US GAAP measure, before acquisitions, reconciliation to free cash flow is provided above.

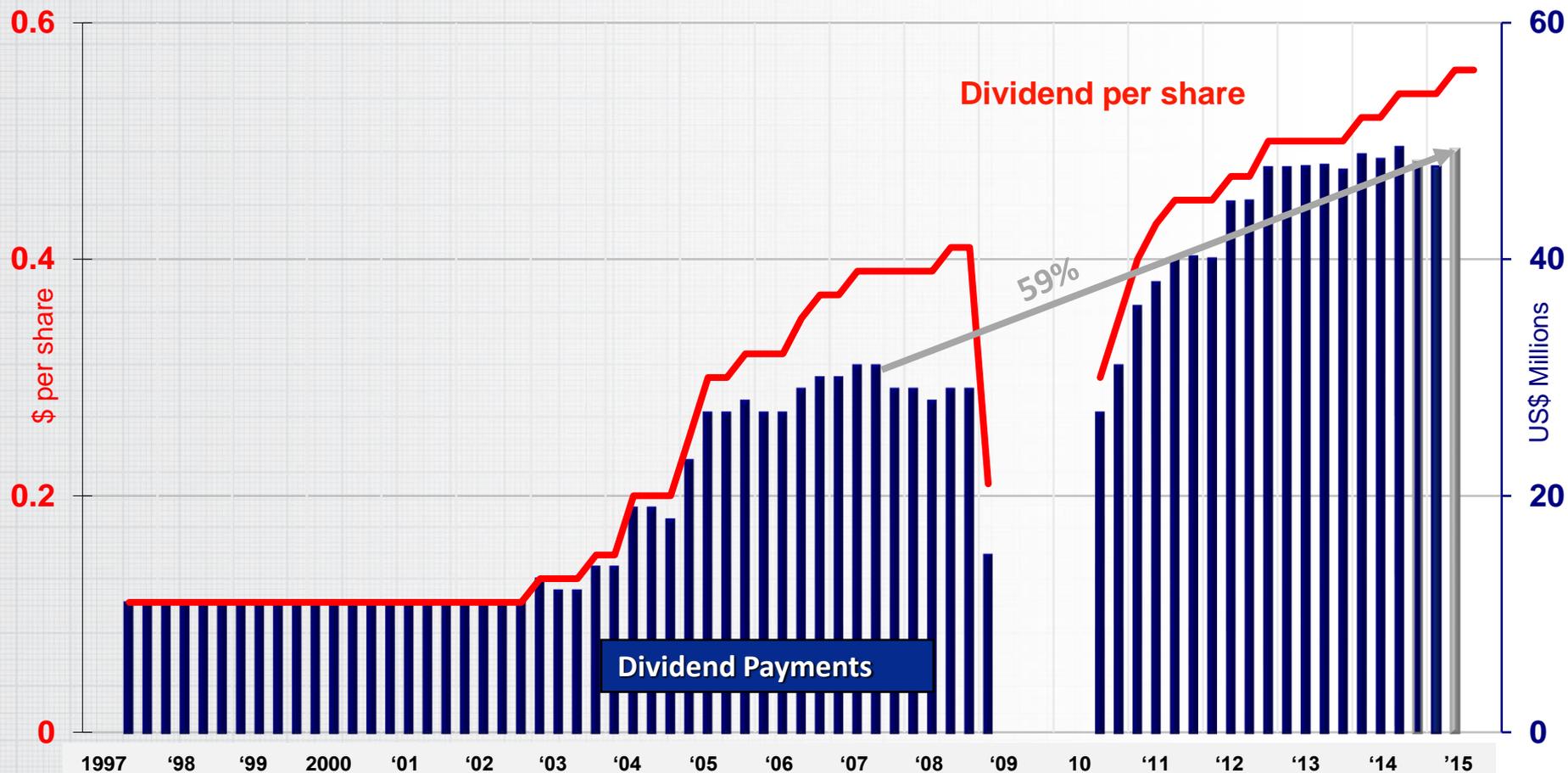
Estimated Currency Effects Q2'15

Translation and Transaction (including revaluation)

YoY change	<u>Q2-15</u>
Sales % (only translation)	(9.9%)
Sales \$ (only translation)	~ (\$237M)
EBIT (translation + transaction & revaluation)	(10) + 4 = ~ (\$6M)
BPS (translation + transaction & revaluation)	50 + 20 = 70
EPS (translation on net income)	(\$0.07)
EPS (transaction & revaluation)	\$0.03
EPS (total)	<u>(\$0.04)</u>
Note that EPS bridge only includes translation FX effects	

Dividend Trend

per share and cash payments*



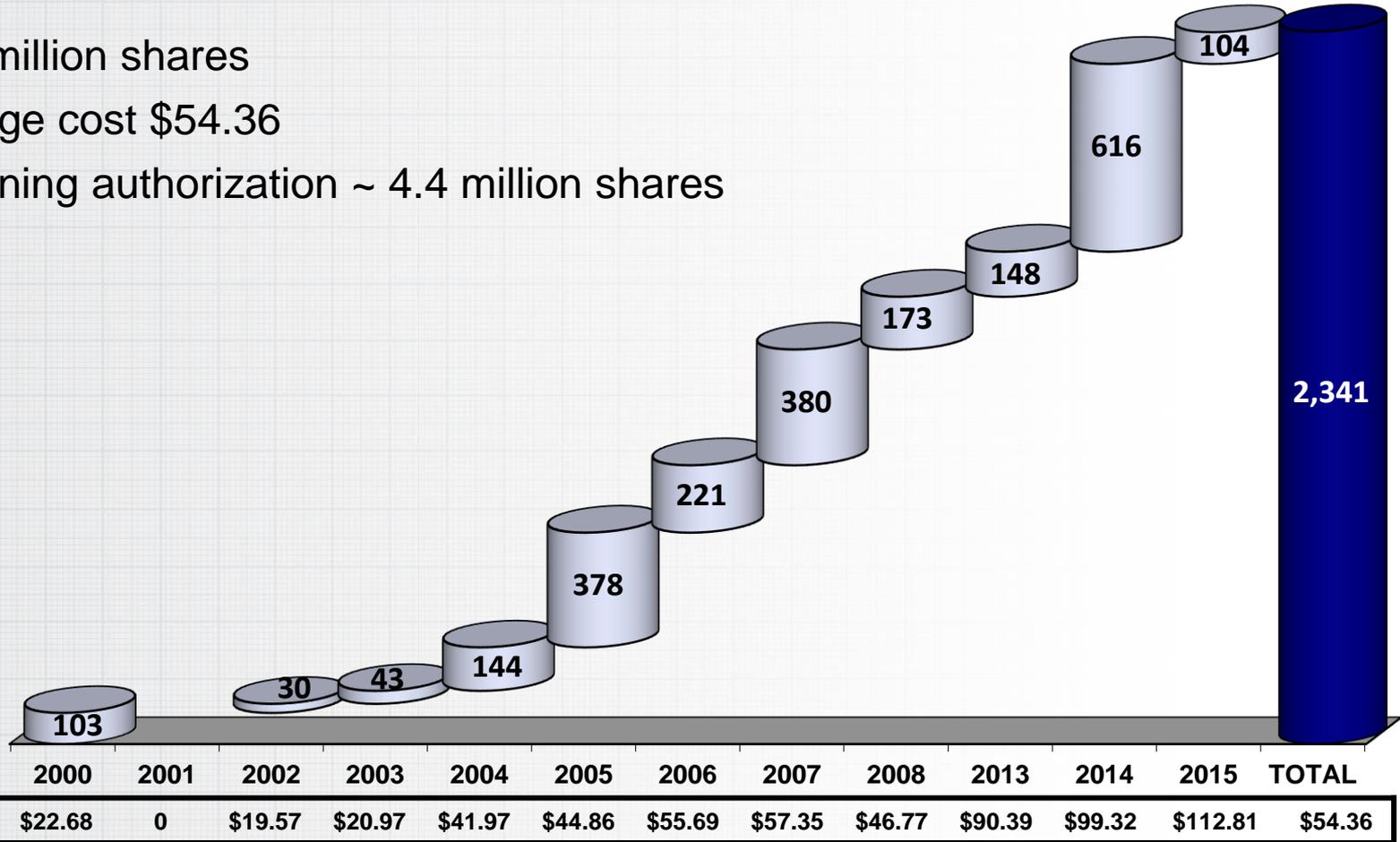
Annualized dividend \$2.24 per share based on dividend declared for Q3'15.

(*) Estimated dividend payment for Q3 2015 based on share count at the end of the 2nd quarter 2015.

Share Repurchase Program as of Q2'15*

Program was re-initiated in October 2013

- 43.1 million shares
- average cost \$54.36
- remaining authorization ~ 4.4 million shares



⚠ Limited “open window” each quarter to repurchase shares.

(*) MUS\$ except where specified.

Share Repurchase Summary

2014-15

Period	Days Traded	Total (\$M)	Avg. cost *	Shares (M)	Shares / day (000's)	Per day (M)	Comments
Q2'15	0	N/A	N/A	N/A	N/A	N/A	N/A
Q1'15	24	\$104	\$112.81	0.9	39	\$4.3	Share price > mandate week 1
Q4'14	29	\$186	\$96.03	1.94	67	\$6.4	extra week
Q3'14	29	\$238	\$102.58	2.32	80	\$8.2	extra week
Q2'14	14	\$97	\$102.92	0.94	67	\$6.9	class action
Q1'14	18	\$94	\$94.71	1.00	55	\$5.2	late close
2014-15	114	\$719	\$101.07	7.13	63	\$6.3	

(*) Includes commission.

Segment Reporting

Q2

	Organic Growth *	Operating Margin		CapEx		D&A	
		2015	2014	2015	2014	2015	2014
Passive Safety ***	5.7%	10.2%	5.5%	5.3%	4.8%	3.3%	3.2%
Airbags	7.1%						
Seatbelts	2.9%						
Electronics ***	8.3%	3.2%	4.8%	3.5%	4.7%	2.9%	2.9%
Passive Safety Electronics	0.7%						
Active Safety	25.6%						
Autoliv Group ****	6.1%	9.5% *	9.3% *	4.8%	4.8%	3.3%	3.2%
GLVP **	(0.3)%						

🌐 Segment reporting under our new organizational structure.

(*) Non-US GAAP Organic Sales Growth, Operating margin excludes costs for capacity alignments and antitrust matters, (**) Global Light Vehicle Production according to IHS @ July 16, 2015, (***) Segment reporting, org growth refers to net sales for the segments and ext sales for product groups, (****) CapEx, net.

Looking Ahead

Q3'15 Guidance**

■ Sales

- **YoY organic sales* increase > 7%**
 - Mainly related to strong growth in Active Safety, Europe, North America, and inflator replacement business along with growth in China
- **Sequential consolidated sales decrease ~ 5%**
 - Mainly due to the seasonality effect in Europe and South Korea

■ Operating Margin* ~ 9%

- **YoY**
 - Positive effects from organic sales*, commodity costs and currencies are partly off-set by RD&E, net and costs related to the ramp-up of capacity for growth
- **Sequential**
 - Lower organic sales* effect and higher RD&E, net

🚫 Organic sales* growth in Q3'15 is more than offset by negative currency translation effects.

(*) Non-US GAAP measures, Operating Margin excludes costs for capacity alignments and antitrust matters, (**) Excludes acquisitions.

Looking Ahead

FY'15 Indication**

■ Sales

- **YoY organic sales* increase > 6%**
 - Mainly related to strong growth in Active Safety, Europe, North America and the inflator replacement business
- **YoY currency translation effect > (8)%**
 - Primarily due to the strengthening US \$

■ Operating Margin* ~ 9.5%

- **YoY**
 - Positive effects from organic sales*, commodity costs and currencies are partially off-set by RD&E, net and cost related to the ramp-up of capacity for growth and vertical integration

🚫 FY'15 indication maintained despite a deteriorating situation in China.

(*) Non-US GAAP measures, Operating Margin excludes costs for capacity alignments and antitrust matters, (**) Excludes acquisitions.

Financial Outlook**

	Q3'15	FY'15
<u>Sales</u>		
Organic*	> 7 %	> 6%
Acquisitions / (Divestitures)	-	-
Fx***	> (9)%	> (8)%
Consolidated Sales	< (2)%	~ (2)%
Operating Margin*	~ 9%	~ 9.5%

Exchange rates***	Q3 2015	FY 2015
EUR / US\$	1.1063	1.1110
US\$ / JPY	121.39	120.90
US\$ / KRW	1134	1116
US\$ / MXN	15.80	15.46
US\$ / CNY	6.21	6.21

🚫 For FY'15 margins are expected to improve even with higher RD&E, net.

(*) Non-US GAAP measures, Operating Margin excludes costs for capacity alignments and antitrust matters, (**) Excludes acquisitions,

(***) Mid-July exchange rates.

Currency Effects Summary

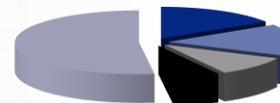
Translation vs. Transaction

Translation

- **Limited Hedging possibilities**
- **~75% of sales non US \$**, mainly EUR, CNY, JPY, MXN & KRW
- **Impacts financial statements***
- **Convert revenue and cost with the same rates**, which could create a limited margin effect based on mix
- **Each quarter the YTD P&L is recalculated** to the current average rate

Transaction**

- **Natural Hedging Strategy*****
- **Net exposure in FY'15 ~\$2.1B** corresponding to ~23% of ALV sales
- **Impacts margins and earnings**
- **>40 currency pairs** with >\$1M exposure
- **Top 4 currency pairs ~ half of net exposure for FY'15**



- Sell USD buy MXN 16%
- Sell EUR buy SEK 16%
- Sell KRW buy USD 10%
- Sell CNY buy EUR 6%
- Other 52%

- **Currency mix as of mid-June** is favorable for ALV however unfavorable for the electronics business

🟡 Stronger US \$ is unfavorable for translation and is presently favorable for transaction** based on a positive mix.

(*) Balance Sheet @ closing rate, Income Statement and Cash flow @ average rate, (**) Includes revaluation effects with inflationary accounting,

(***) Currency hedges are considered on a case by case basis for specific components.

H1'15 Highlights

Sales growth in line, margins better than expected

■ Financial Performance

- Organic Sales* growth 5.0%, vs. an LVP increase of 1.3%
- Operating margin* 9.2%
- EPS* \$3.04, ~ 6% better than PY
- Operating cash flow \$238M
- RoCE* ~ 23%, RoE* ~ 16%

■ Shareholders returns and Capital Structure

- Record dividend \$1.10 per share
- \$202M returned to shareholders

■ Active Safety

- Organic sales* growth ~ 28%
- Expanding capabilities thru acquisitions

● Strong product and geographic diversification supporting solid financial performance.

(*) Non-US GAAP measure, Earnings per share, Return on Capital Employed and Return on Equity exclude costs for capacity alignments and antitrust matters, Light Vehicle Production according to IHS @ July 16, 2015.

H1 Financial Overview

Solid financial performance

(US\$ Million's unless specified)	2015	2014
Sales	\$4,466	\$4,679
Gross Profit	\$883 19.8%	\$910 19.4%
Operating Income*	\$410 9.2%	\$418 8.9%
EPS* (assuming dilution)	\$3.04	\$2.88
RoCE*	23%	24%
RoE*	16%	14%
Operating Cash flow	\$238	\$271
Dividend**	\$1.10	\$1.04
GLVP*** (annual run rate)	~ 87.8M	~ 86.7M

🚫 H1'15 currency translation effect on sales ~ (\$447)M and net currency effect on EPS is \$0.02.

(*) Non-US GAAP, Earnings per share (fully diluted), Return on Capital Employed and Return on Equity exclude costs for capacity alignments and antitrust matters,

(**) Dividend paid per share, (***) Global Light Vehicle Production according to IHS @ July 16, 2015.

Segment Reporting

H1

	Organic Growth *	<u>Operating Margin</u>		<u>CapEx</u>		<u>D&A</u>	
		2015	2014	2015	2014	2015	2014
Passive Safety ***	4.4%	6.9%	6.7%	5.9%	4.5%	3.3%	3.2%
Airbags	5.1%						
Seatbelts	3.1%						
Electronics ***	8.0%	2.9%	5.0%	3.4%	4.1%	3.0%	2.9%
Passive Safety Electronics	(0.9)%						
Active Safety	28.4%						
Autoliv Group ****	5.0%	9.2% *	8.9% *	5.3%	4.4%	3.3%	3.2%
GLVP **	1.3%						

🔄 Segment reporting under our new organizational structure.

(*) Non-US GAAP Organic Sales Growth, Operating margin excludes costs for capacity alignments and antitrust matters, (**) Global Light Vehicle Production according to IHS @ July 16, 2015, (***) Segment reporting, organic growth refers to net sales for the segments and ext sales for product groups, (****) CapEx, net

Light Vehicle Production

H1

Vehicles in millions	2015	2014	2015 vs. 2014		ALV Organic * Growth
			@ Jul 16	@ Apr 16	
Americas	10.3	10.5	(1)%	0%	5.7%
- North America	8.7	8.6	2%	2%	
- South America	1.6	1.9	(16)%	(9)%	
Europe	10.8	10.5	2%	0%	8.2%
- WEU	7.3	7.0	4%	2%	
- EEU	3.5	3.5	(2)%	(4)%	
Asia	21.7	21.4	1%	2%	1.0%
- Japan	4.2	4.7	(9)%	(8)%	(1.5)%
- China	11.3	10.6	6%	9%	(0.8)%
- RoA	6.2	6.1	1%	(1)%	5.8%
Other *	1.1	0.9	17%	5%	
Total Global	43.9	43.3	1.3%	1.3%	5.0%

🚗 H1'15 organic sales growth ~ 4 times LVP.

Source: IHS @ July 16 and April 16, 2015, (*) Middle East/ Africa, (*) Non-US GAAP Organic Sales Growth.

Strong Volume Growth

Unit growth exceeds LVP in all product areas

Autoliv Quantities Delivered (Millions unless specified)	H1'15	vs. PY
Seatbelts	73.8	2%
• Pretensioners (of which)	30.2	2%
• Active Seatbelts (of which)	1.5	16%
Frontal Airbags	24.2	6%
• Knee Airbags (of which)	2.7	7%
Side Airbags	44.5	5%
• Chest (Thorax)	24.0	5%
• Head (Curtain)	20.5	4%
Steering Wheels	8.4	10%
Electronic Control Units	8.8	3%
Active Safety Sensors	2.9	40%
LVP* TRIAD	20.3	0.2%
LVP* GLOBAL	43.9	1.3%

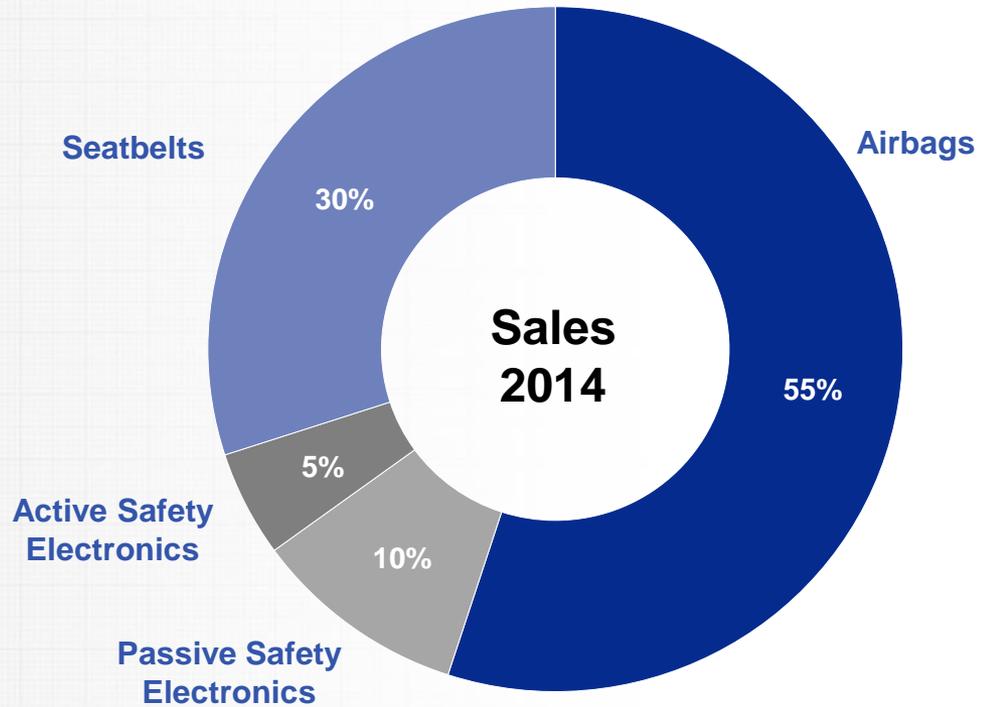
🚫 ECU volumes were slightly negative due the timing of new program phase-ins.

(*) Light Vehicle Production according to IHS @ July 16, 2015, TRIAD (WEU, North America, Japan).

Autoliv in Brief

Products

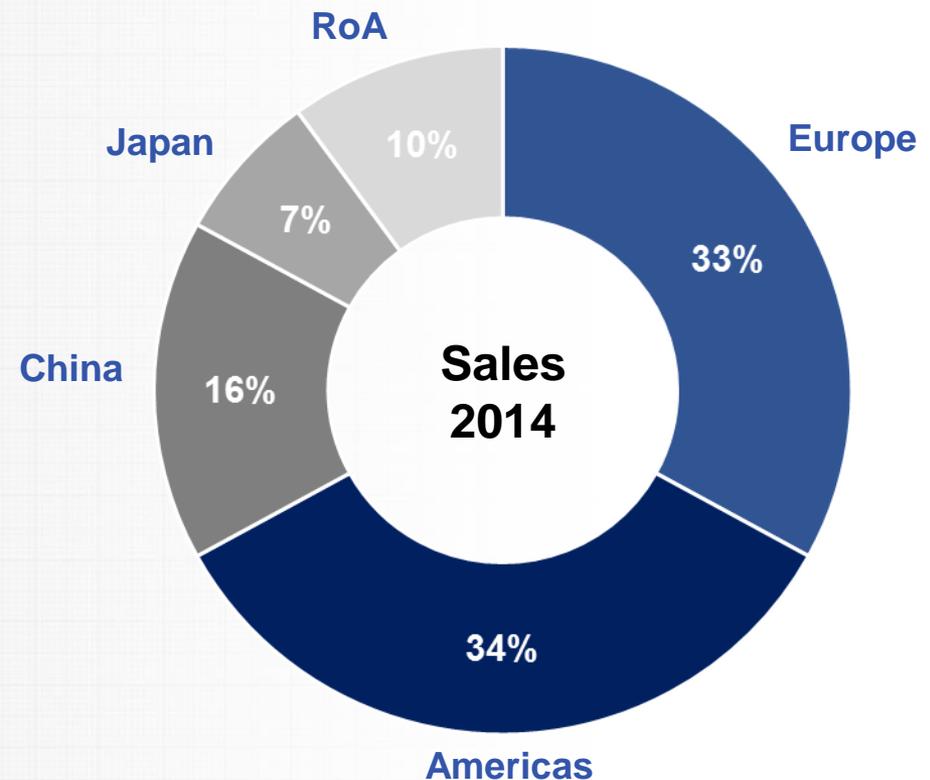
- Sales and technology leader
- Sales US\$9.2 billion
- Sales to all major vehicle manufacturers
- Fortune 500 company with an A- credit rating (S&P)
- ~ 80 facilities in 28 countries
- 18 technical centers and 20 crash test tracks
- > 60,000 associates of which ~ 5,500 in R,D&E



Autoliv in Brief

Global Footprint

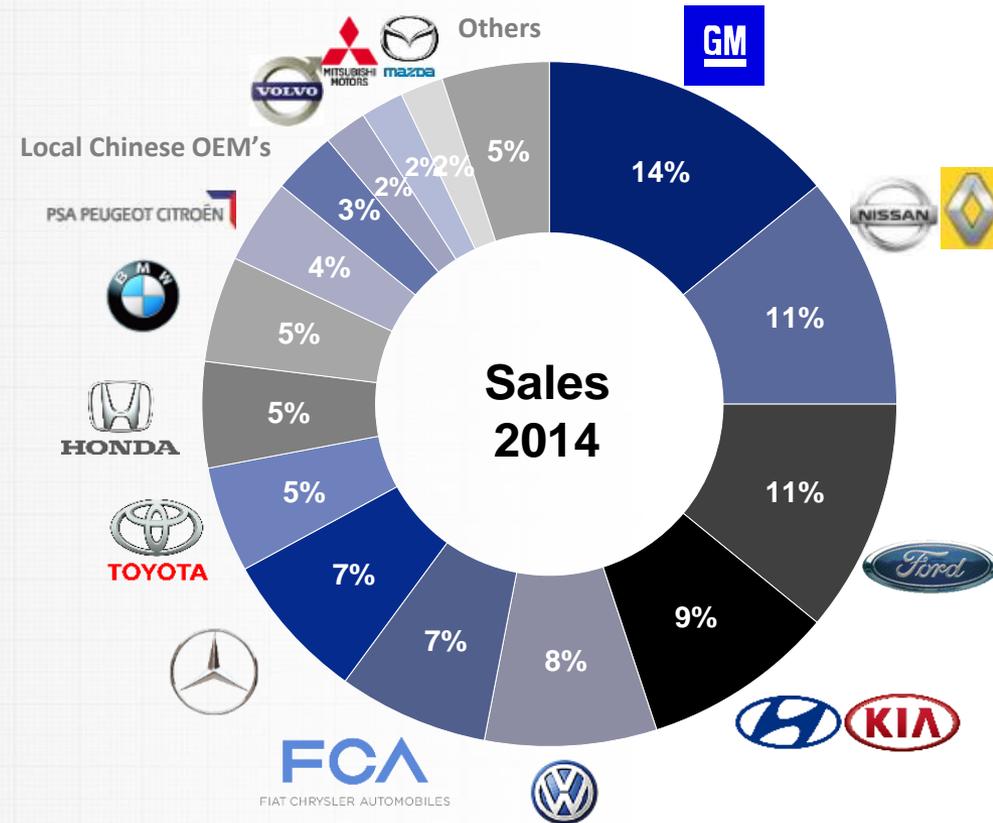
- Sales and technology leader
- Sales US\$9.2 billion
- Sales to all major vehicle manufacturers
- Fortune 500 company with an A- credit rating (S&P)
- ~ 80 facilities in 28 countries
- 18 technical centers and 20 crash test tracks
- > 60,000 associates of which ~ 5,500 in R,D&E



Autoliv in Brief

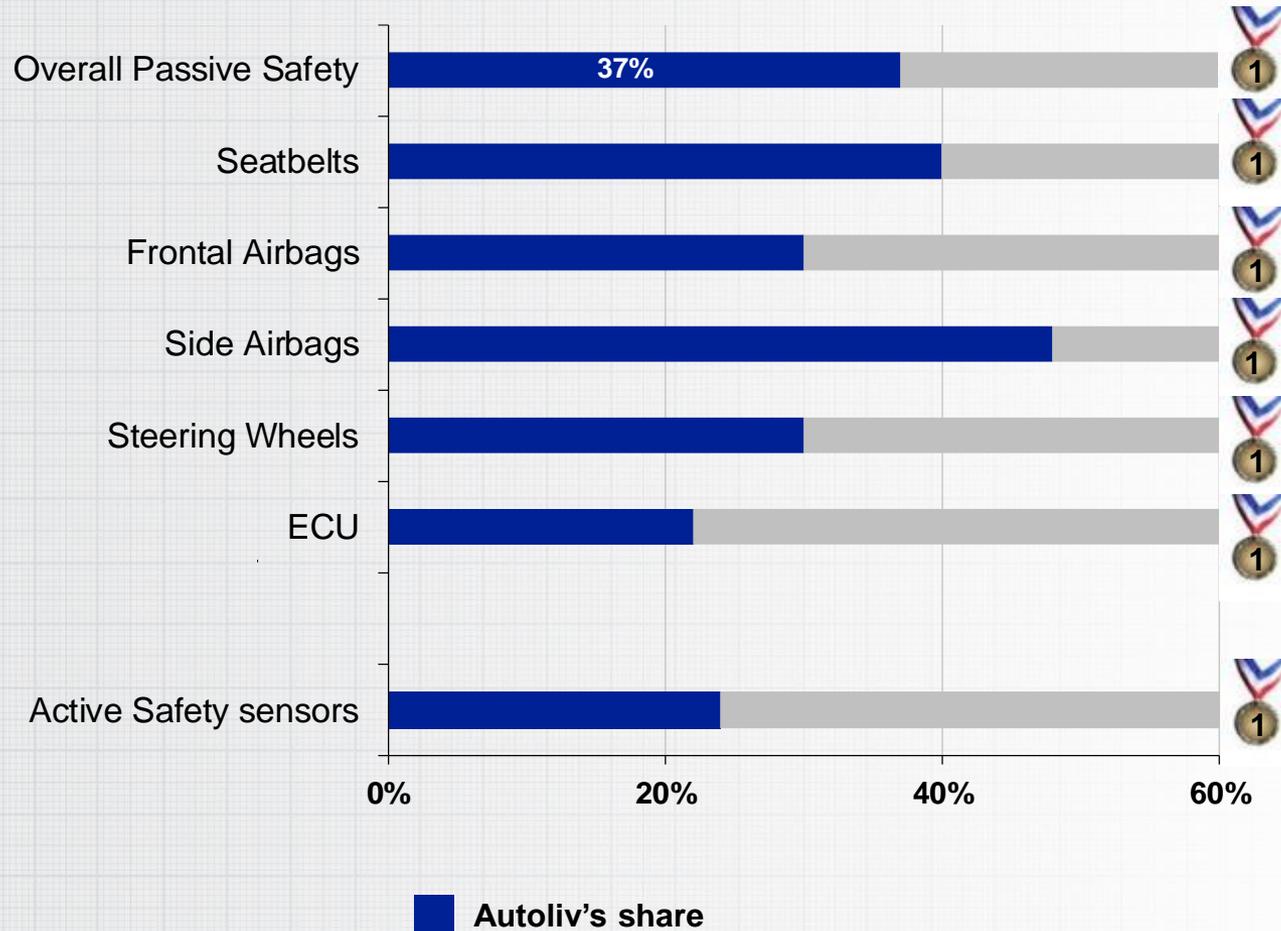
Customers

- Sales and technology leader
- Sales US\$9.2 billion
- Sales to all major vehicle manufacturers
- Fortune 500 company with an A- credit rating (S&P)
- ~ 80 facilities in 28 countries
- 18 technical centers and 20 crash test tracks
- > 60,000 associates of which ~ 5,500 in R,D&E



Market Shares 2014

Global Safety Market Share by Product



Key Focus Areas



Savings lives and safety around the automobile



Lead through innovation and technology



Leverage global footprint and talented-skilled people



Zero defects and customer focus

Company Strategies

Core Strategies

Quality

Q5

Zero Defects by
flawless execution



One Product One Process



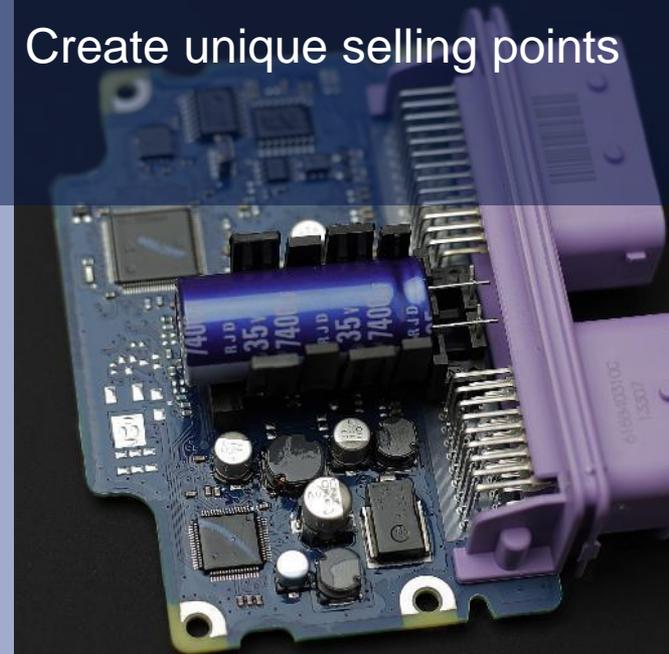
To improve cost
effectiveness and
robustness



Innovation



Create unique selling points



Our Zero Defect Policy

Design robust products

Buy flawless components

Manufacture flawless products

Verify conformity of products



Product & Process Development

Supplier Management

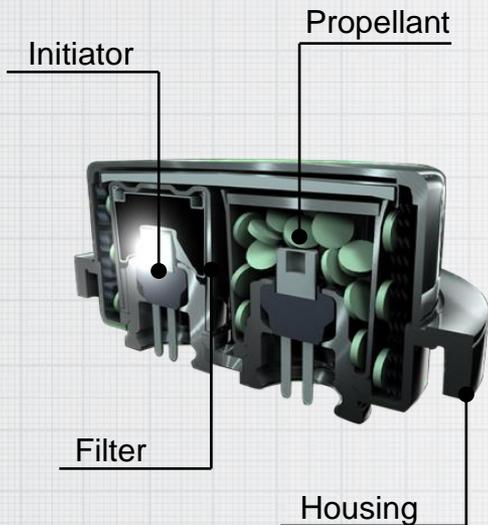
Production System

After Delivery

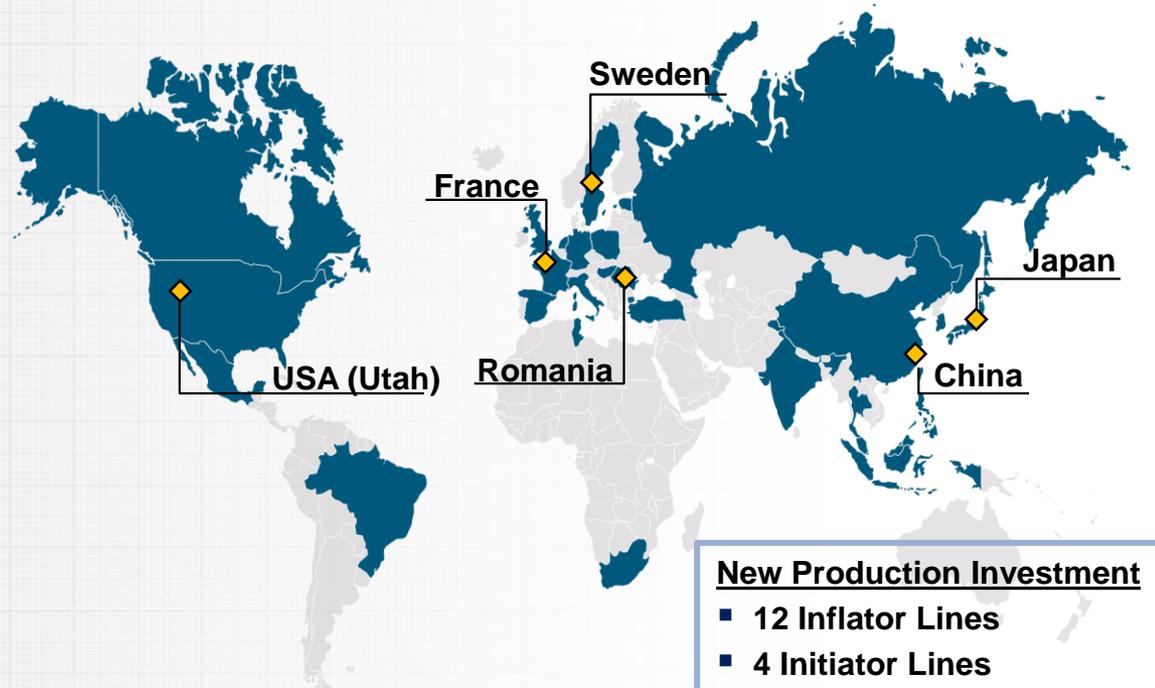
Autoliv Inflators

an industry standard

Pyrotechnical Inflator



Manufacturing Footprint



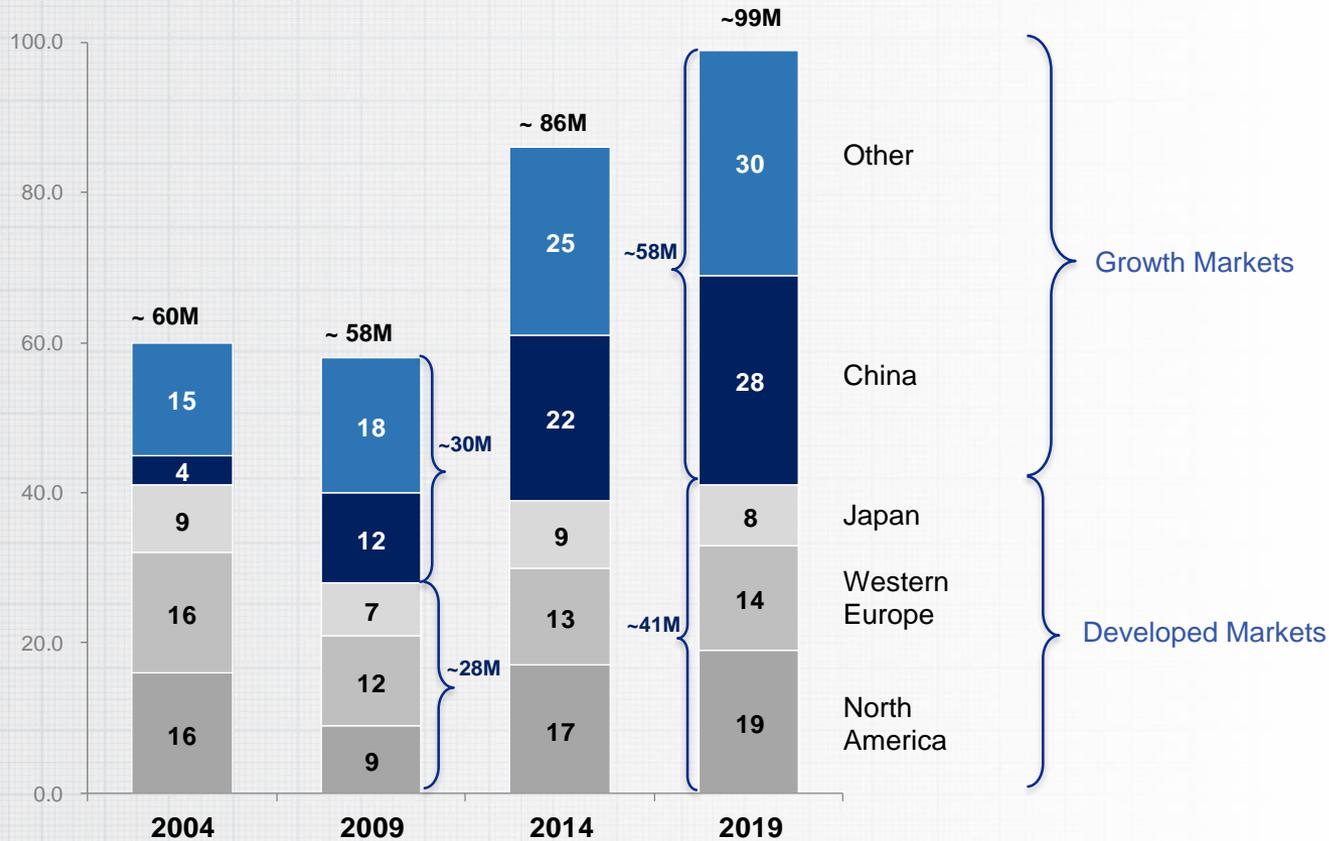
- New Production Investment**
- 12 Inflator Lines
 - 4 Initiator Lines
 - 1 Spray Dryer
 - 5 Presses

Current best estimate is to supply up to 20 million inflators.

Light Vehicle Production Outlook

2004 thru 2019

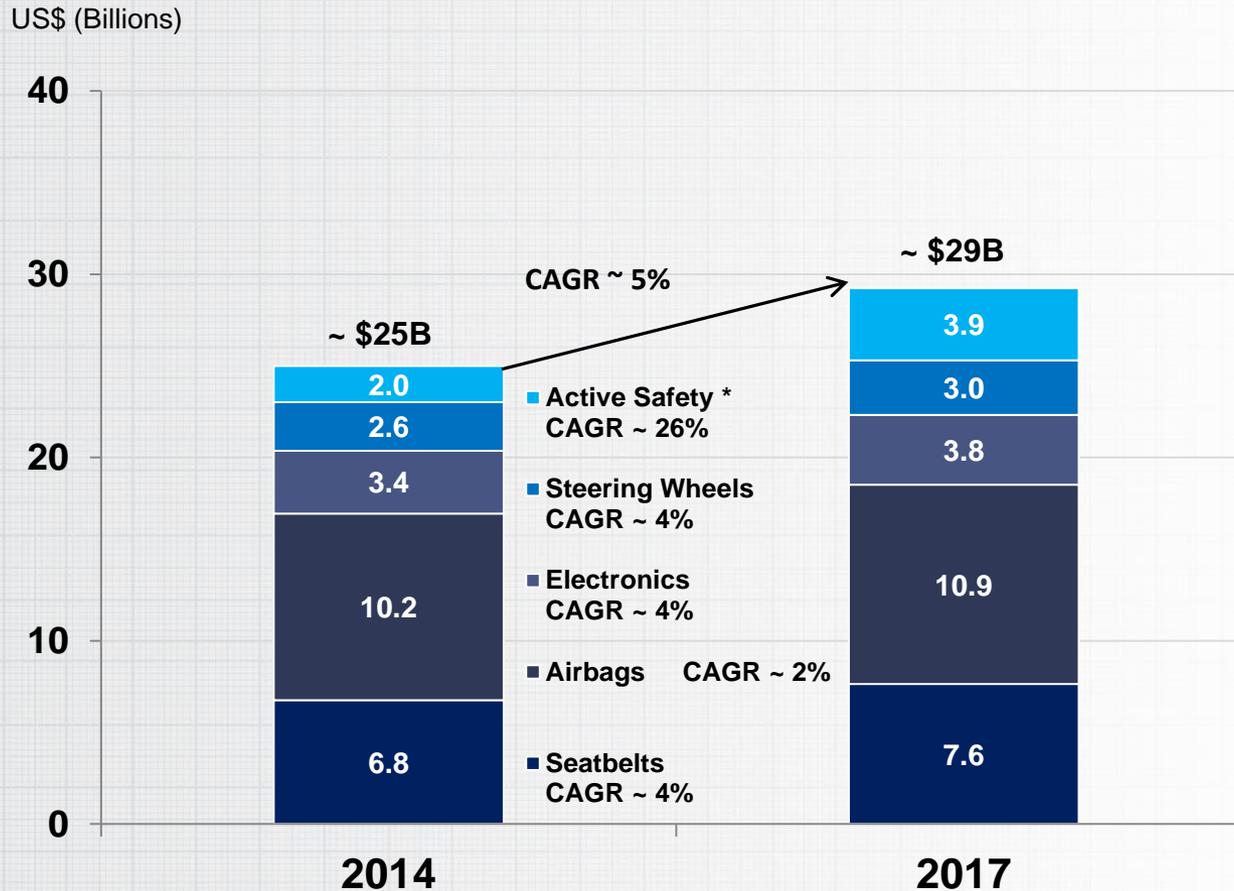
Million Units



Source: IHS @ January 16, 2015

Growth Drivers by Product

Strong presence in product growth segments

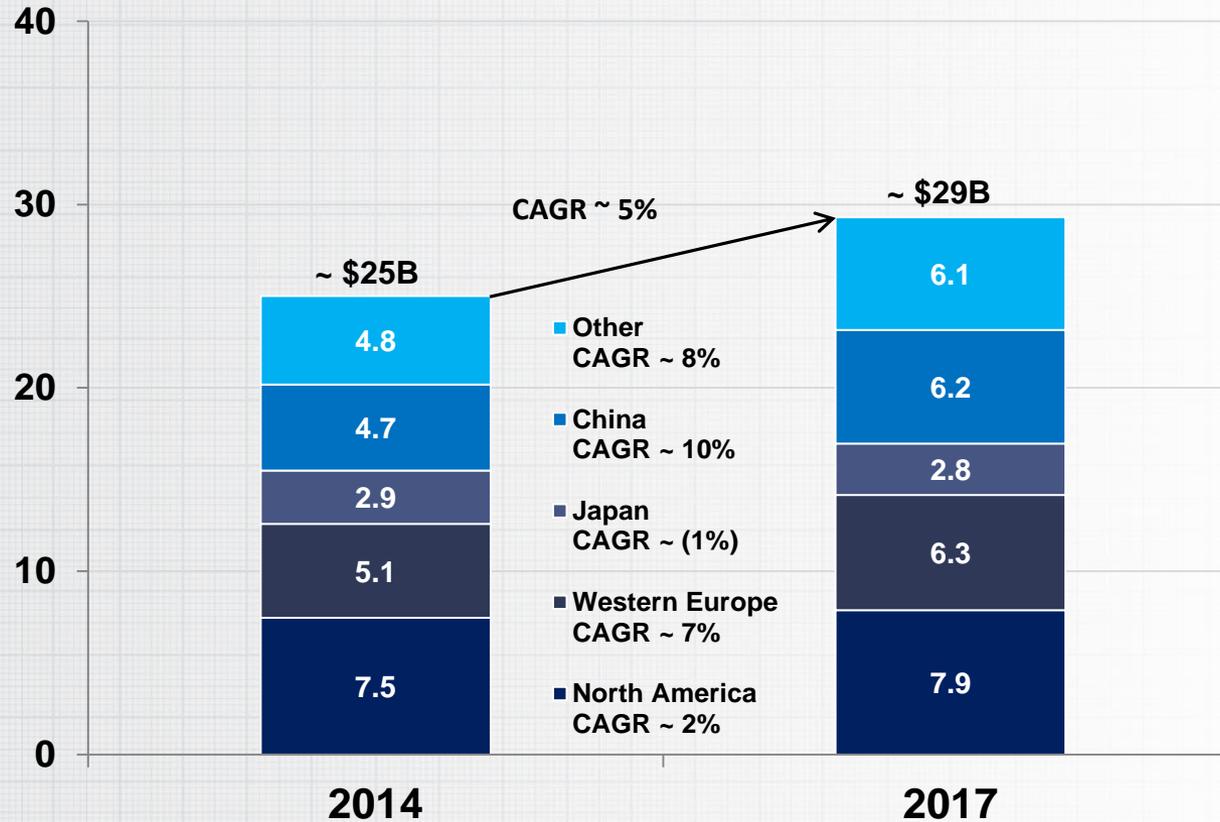


(*) Includes radar, front-view camera, night driving assist. CAGR = Compound Annual Growth Rate

Growth Drivers by Region

Strong presence in growth markets *

US\$ (Billions)



(*) Growth Markets (Eastern Europe, Asia excluding Japan, South America, Middle East/Africa). CAGR = Compound Annual Growth Rate

The Road to Saving More Lives

Passive safety products, such as airbags and seatbelts, are there to help protect you from injury if a crash is unavoidable. More than a million human beings owe their life to them.

PROTECTION

AUTONOMOUS
DRIVING

The major advancement from Active Safety products is to reduce the crash severity and avoid the crash altogether by warning the driver or automatically braking the car.

PREVENTION

In the future, self driving cars will ultimately provide the third level of automotive safety, significantly reducing the element of human error.

Allowing the car to act automatically is crucial when moving towards our vision of saving 150,000 lives per year.

AUTOMATION

Automated Driving

Traffic Deaths



By eliminating human errors that cause traffic accidents, Automated Driving can:

- Prevent millions of crashes
- Reduce the severity of injuries and property damage
- Save lives

Additional benefits:

- Increase driver comfort and productivity
- Use infrastructure more efficiently
- Reduce environmental impact
- Improve mobility

Integrated safety

- The traditional view



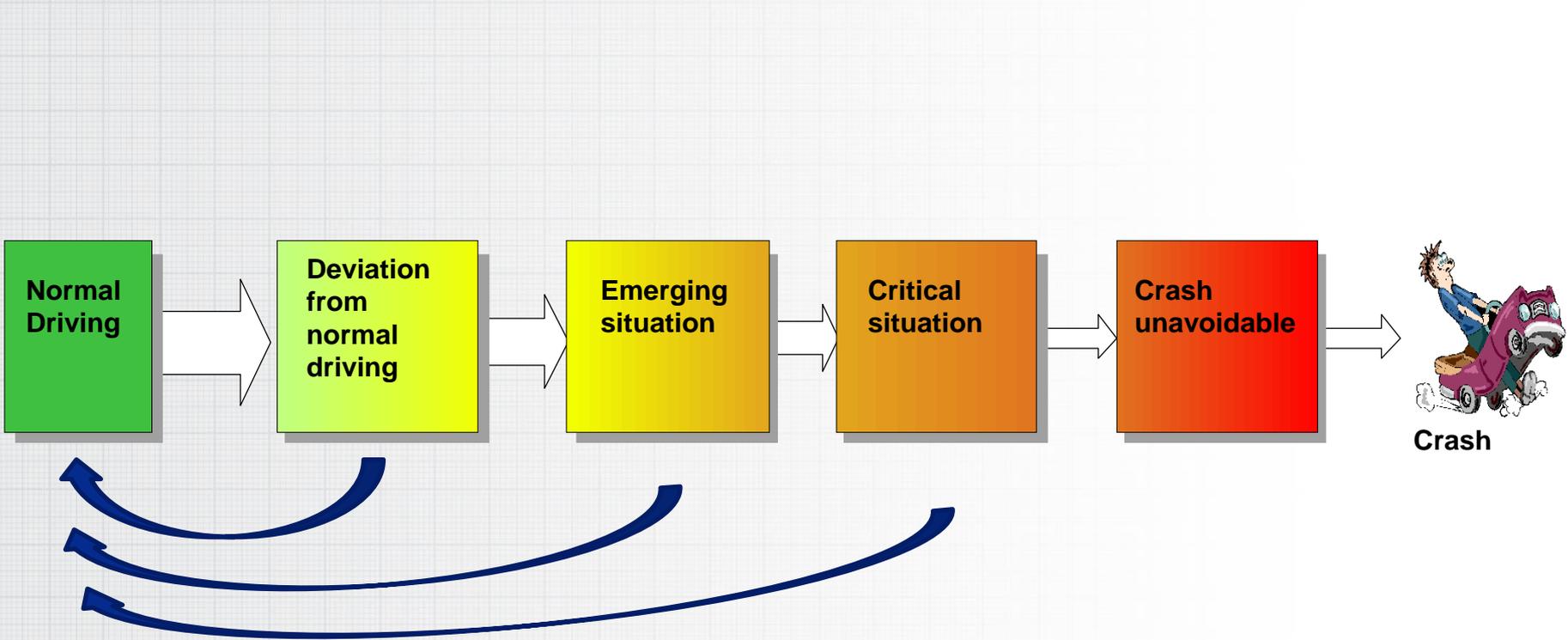
POINT OF
NO RETURN

**Assistance
Features**

**Prevention
Features**

**Protection
Features**

The integrated safety chain model



Evolution of Driver Assistance

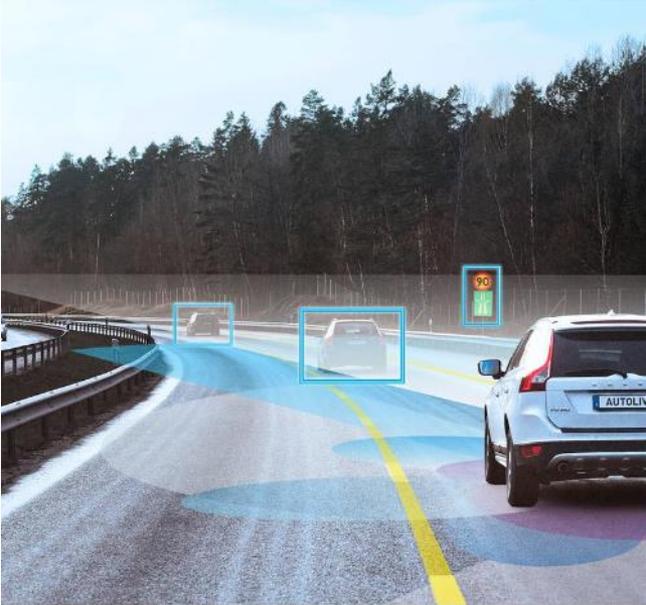


Autonomous Emergency Braking (AEB)

an important enabler for Automated driving

Autoliv

- Radar based AEB in production since 2013
- Sensor fusion AEB launching in 2015
- Vision based collision warning launching in 2015



City



Interurban



Pedestrian



Cyclist



Intersections



night time and
all weather
capability



24h/365

2015 Autoliv Vision System

In-house developed algorithms for scalability

Lane Departure
Lane Keep Assist



High-Beam
Assist



Traffic Sign
Recognition



Automatic
Emergency Braking



Pedestrian
Protection



Free Space
Road Surface



Premium



SOP 2015



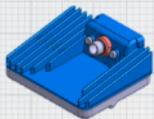
Safety / NCAP



SOP 2015



Assist



SOP 2015



Autoliv
Safety Systems

*Active
Safety*

*Passive
Safety*

Autoliv

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

and prevent ten times
as many severe injuries