



VALEO
Electrification :
a key pillar of our growth

HSBC MARCH 22nd, 2021

SMART TECHNOLOGY FOR SMARTER MOBILITY



VALEO RESERVED

valeo

MARKET

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ELECTRIFICATION IS NOW.. AND NO LONGER AN OPTION

Reason #1 CO₂ REGULATION



Reason #3 Countries BAN all thermal engines



Reason #2 DIESEL ban in cities BIG CITY pressure to clean-up inner city air pollutions



Reason #4 CHINA wants to take leadership NEV (BEV + PHEV) targets

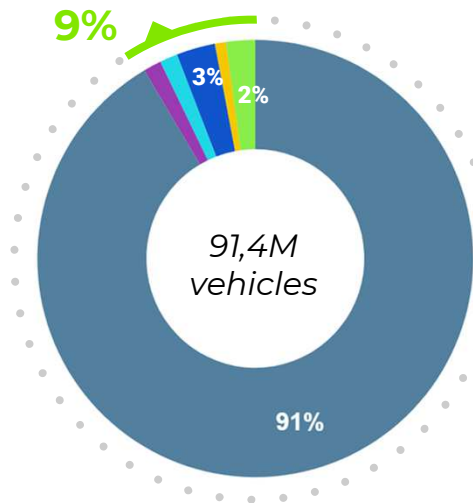


The 2020-2030 decade will see a massive shift By 2030, 68% of WW cars produced will be electrified

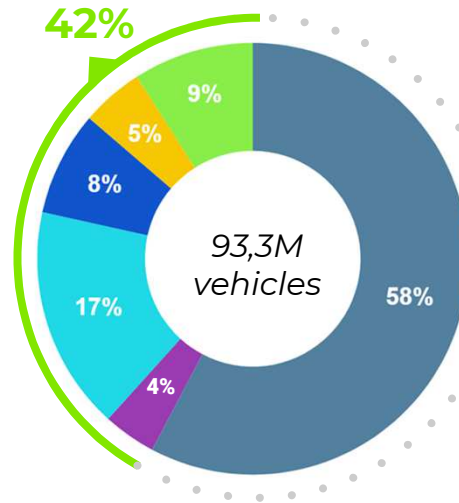


Vehicles < 6 Tons

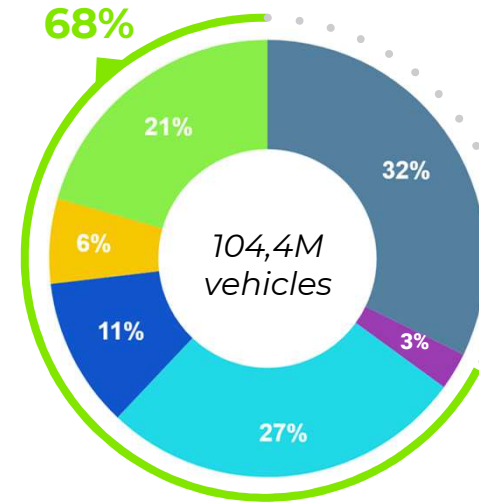
2019



2025



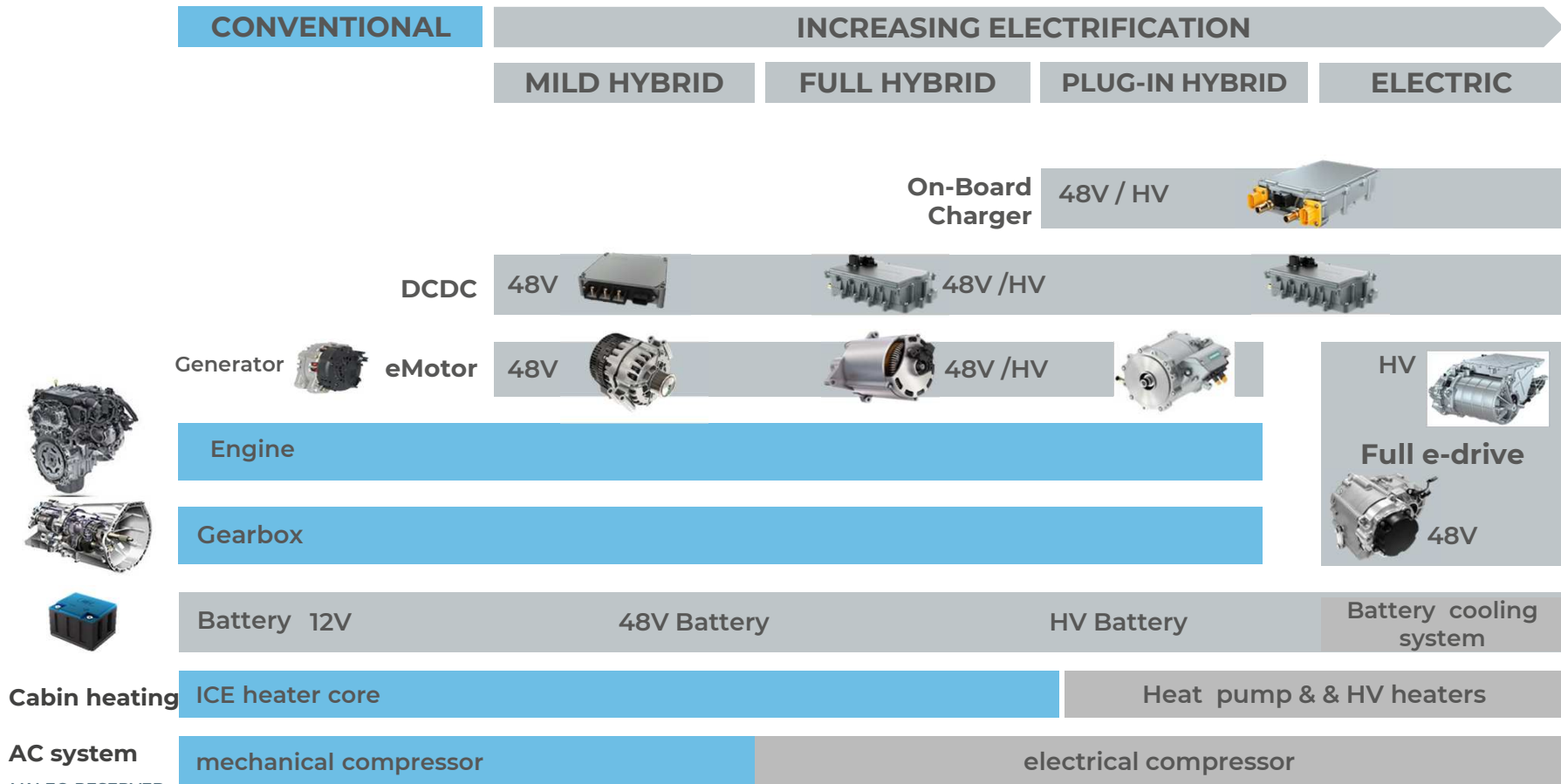
2030



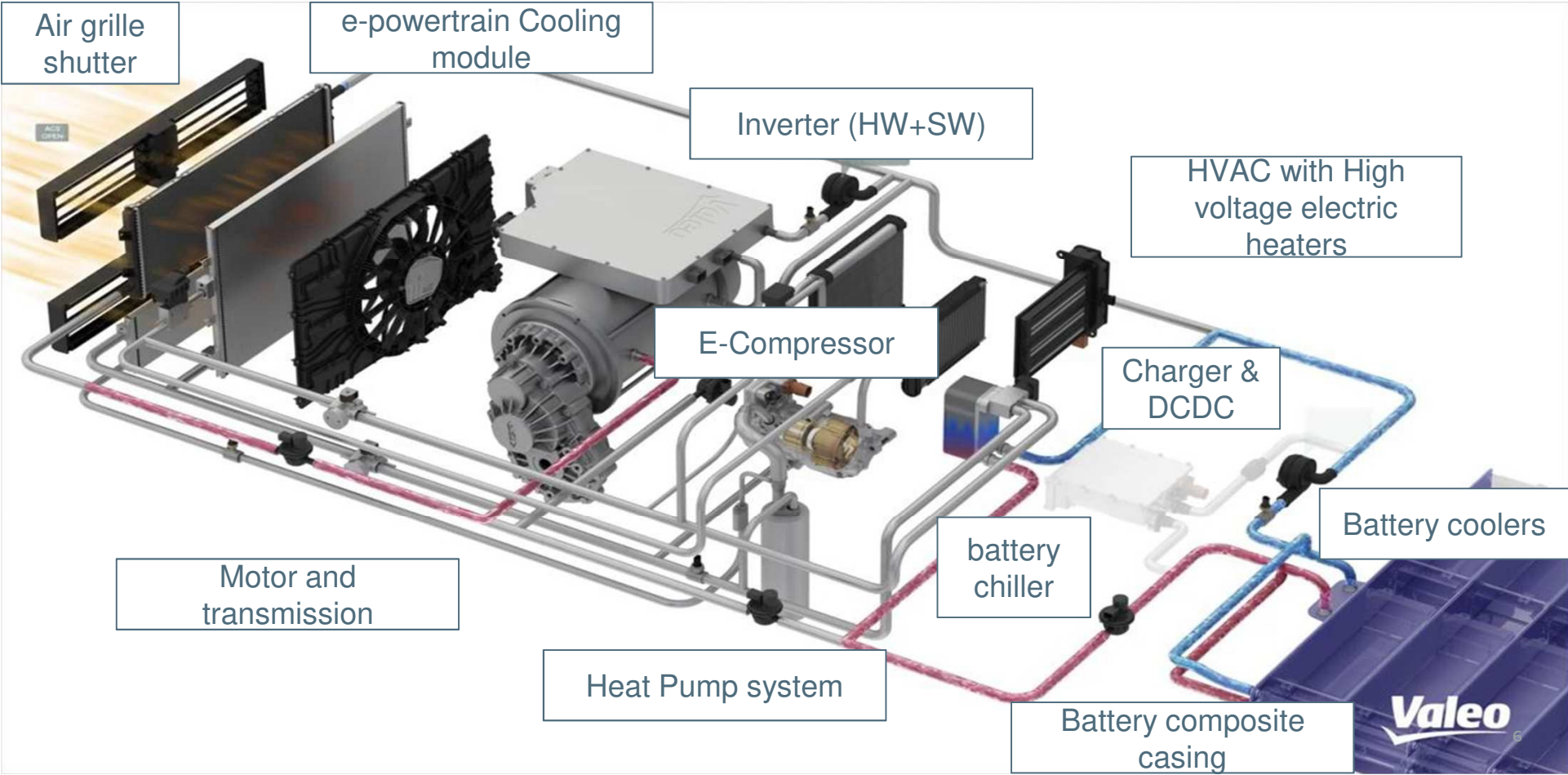
- Conventional
- 12+12V
- 48V HEV
- FHEV
- PHEV
- BEV

In 2030, 48V and BEV will take highest share of electrified powertrains.

Technology also will experience a fundamental shift



Car architectures are completely redesigned









But no “one size fits all”. Different uses, different solutions

LOW VOLTAGE (12V & 48V) **Valeo**

Valeo SIEMENS
eAutomotive

HIGH VOLTAGE
(60V+)

Small Electric	Light Electric	Mild hybrid	Hybrid	Plug-In Hybrid	Full Electric
<p>Zero emission zone</p> <p>Small mobility</p> <p>≤ 100km</p> <p>≤ 50km/h</p> 	<p>Zero emission zone</p> <p>Light mobility</p> <p>100km – 150km</p> <p>Up to 100 km/h</p> 	<p>4 to 6%* CO₂ benefits on WLTP</p> <p>First level of hybridization</p> 	<p>Up to 15%* CO₂ benefits on WLTP (up to 20% in HV)</p> <p>Diesel alternative</p> <p>Affordable cost</p> 	<p>Up to 70%* CO₂ benefits on WLTP (up to 40% in 48V)</p> <p>PHEV over 50 km (City 25km in 48V)</p> 	<p>Zero CO₂ emission</p> <p>Performance</p> 



VALEO SOLUTIONS

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We transform totally out product portfolio : 48V

Fully re-usable platforms

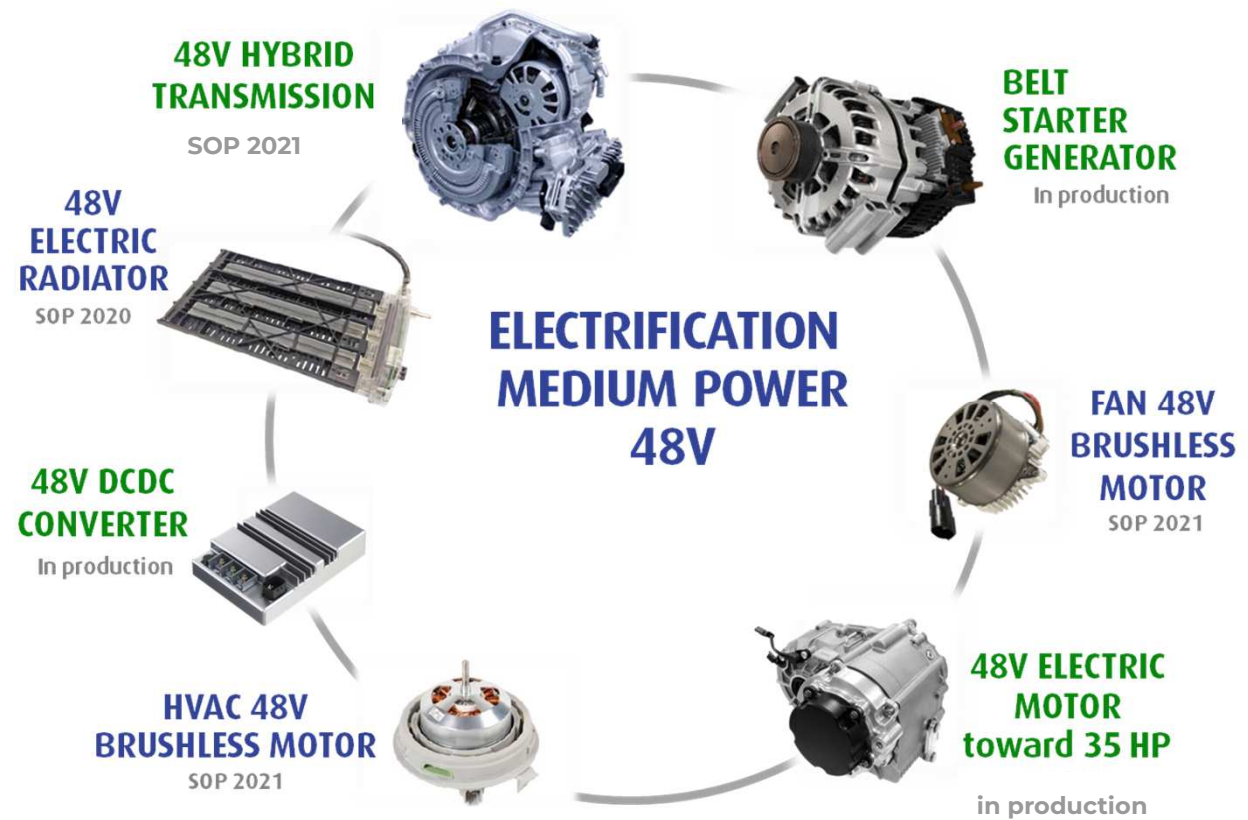
Full powertrains

All motors

All electronics

All softwares

Thermal systems



Our 48V customer portfolio

2020 - 2022 : VALEO 48V INTO 60 VEHICLES

40% market share = Worldwide leader



We transform totally out product portfolio: 400-800V

Fully re-usable platforms

Full powertrains

All motors

All electronics

All softwares

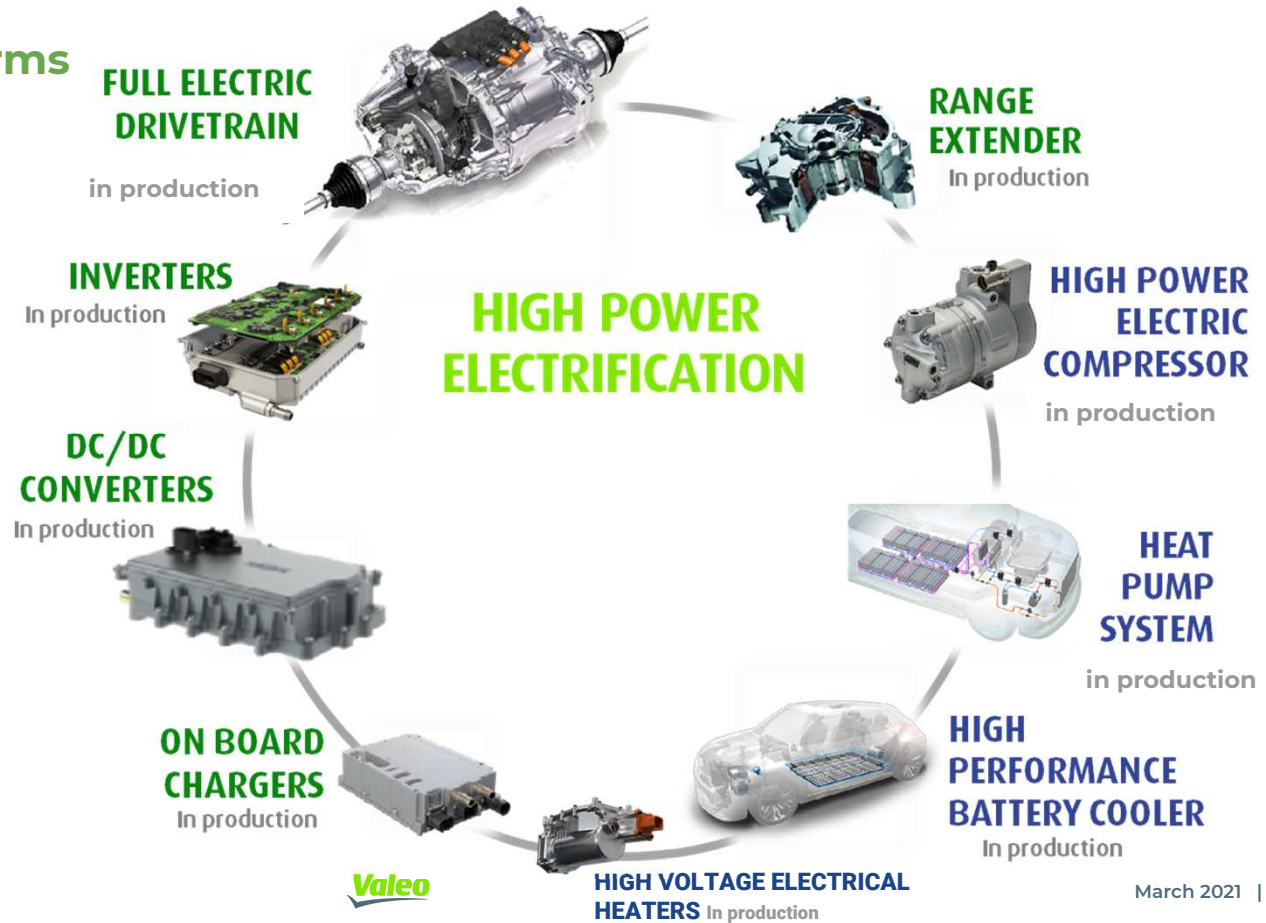
Full thermal system

A/C compressors

Battery cooler

Heat pumps

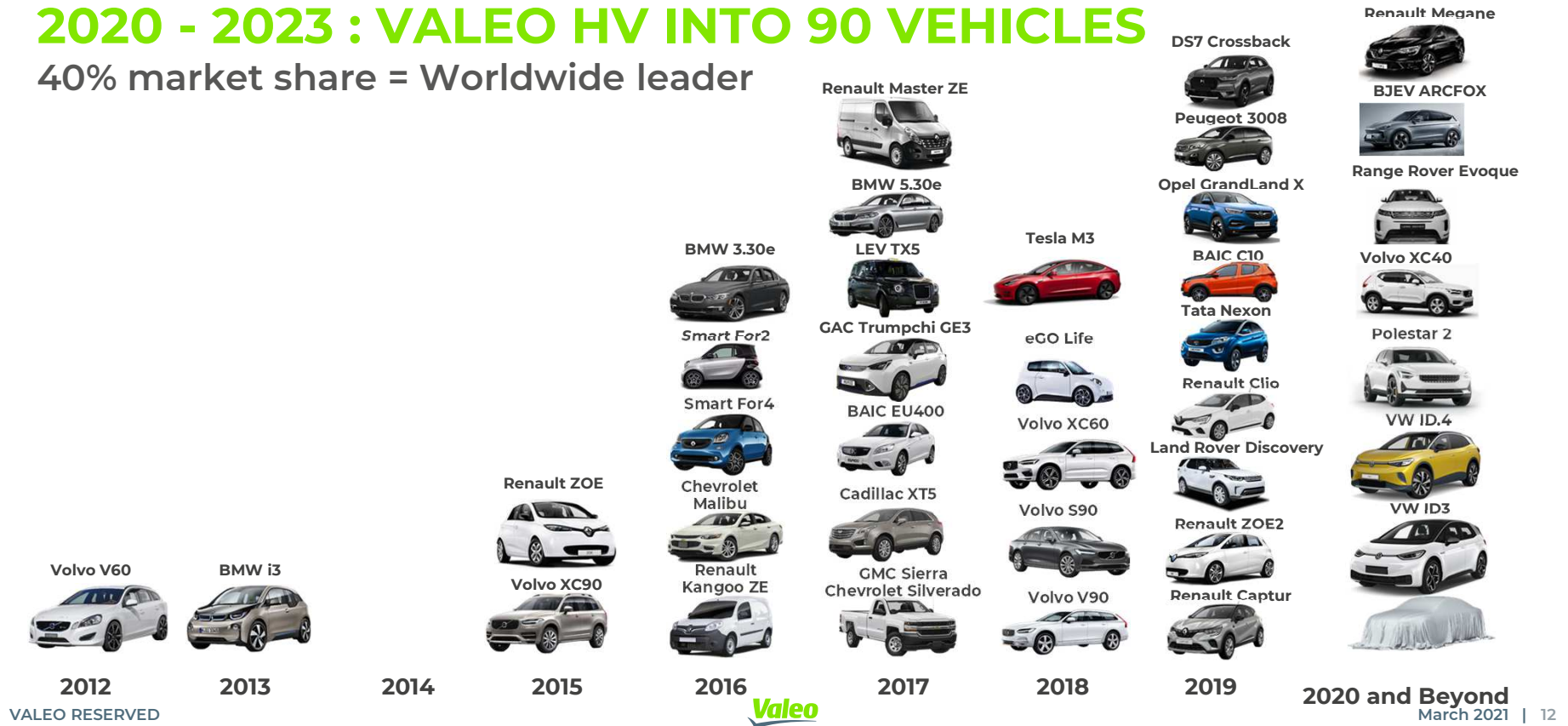
Electric Heaters



Our high voltage customer portfolio

2020 - 2023 : VALEO HV INTO 90 VEHICLES

40% market share = Worldwide leader



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But also ...

e-City cars



e-Delivery Droids



Last Mile delivery e-City Truck



e-Moped



e-Rickshaw



e-4 Wheeler

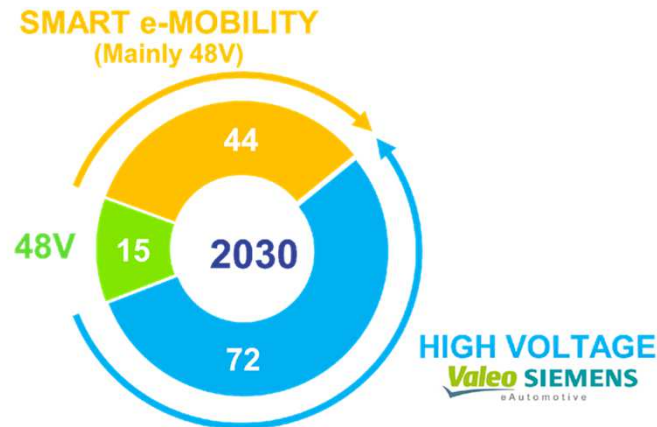


e-Bike

Some key figures about electrification at VALEO

2030
ELECTRIFICATION
MARKET*

€131Bn



> 5000
Engineers
worldwide

> 3000
Granted patents

> 2,000,000 lines of code
In our softwares

> 35 sites
In 15 countries

And it's just a start !...



SMART TECHNOLOGY
FOR SMARTER MOBILITY