



Technology with Vision

Innovations for Tomorrow

Lighting and Electronics to shape the future of mobility

Dr. Rolf Breidenbach
President & CEO

**China is and remains one
of the most important
markets for HELLA**

HELLA is a close industry partner since 1899

HELLA locations worldwide

over

125

Broad portfolio



Lighting



Electronics



Aftermarket



Special Applications

Consolidated sales in FY17/18

7.1

EUR billion

Employees worldwide

40,000

HELLA has a powerful set-up: in and for China

Start of production
in China

1992

Regional
footprint

17
entities
including 5 JVs

Regional
sales in FY17/18

844
EUR million

Employees
in China

6,200
thereof 1,300 in
Research & Development

**China is the pacesetter
of the current industry
transformation**

HELLA follows a dedicated strategy for the Chinese market

- 1 Roll-out of core technologies for market trends**
e.g. 77 GHz radar for automated driving functionalities
- 2 Provide (sub-)systems for relevant use cases along market trends**
e.g. PowerPack 48V, automated parking scenarios
- 3 Localize technologies for Chinese customers**
e.g. e-mobility and LED solutions specifically for local car makers
- 4 Enhance local footprint and cooperation network**
e.g. expansion of electronics plant in Shanghai, new partnerships

E-mobility and autonomous driving are accelerating the industry change

Energy Efficiency & Electrification



- ❖ Shift within **powertrain concepts** with **higher dynamics**, mainly **driven by China**
- ❖ **Clear trend** for **almost 100% electrification** supported by **“at least” 48V hybrid solutions** as **bridging technology**

Autonomous Driving



- ❖ **Mid-level of automatization** with strongly **increasing shares**, while **market penetration** of **higher levels** moved **further away**
- ❖ **Development strategy** in **China** in favor of **intelligent connected mobility infrastructures**

The electrification of mobility is a major growth driver for HELLA

- 1** Provide product solutions for all stages of electrification
- 2** Roll-out of core components designed for the Chinese market, e.g. Battery Management System
- 3** Accelerate development of 48V solutions as bridging technology towards e-mobility
- 4** Launch 48V subsystems jointly with local partner, e.g. PowerPack 48V



Autonomous driving means great chances: for China and HELLA

1 Supply key components, e.g. radar and camera software

2 Provide subsystems for dedicated use cases, e.g. for automated parking

3 Support development of intelligent mobility infrastructures, e.g. for Beijing

4 Utilize tech start-ups to expand sensor portfolio, e.g. Lidar technologies

**An elaborated network
will be a key enabler
for HELLA in China**

HELLA already has a strong partnership footprint in China...

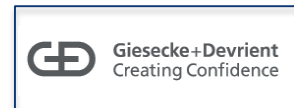
Joint Venture

Strategic Partnership

Lighting



Electronics



... and will complement this network with new cooperations

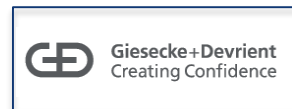
Joint Venture

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Innovative mobility solutions: in China – for China