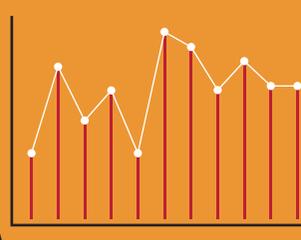




EPS Industry Outlook 2015



Steering a vehicle is no longer only about control and driver feedback; in a world of ever diminishing resources, it's as much about conserving energy and reducing fuel consumption as it is about enhancing the driving experience.

1 Penetration and Unit Shipment Breakdown Europe

Despite a long established presence in the European passenger vehicle market, EPS systems, which have been restricted to smaller and lighter vehicles, are not being introduced in heavier and larger vehicles.

2013

EPS Enabled 67.2%

Non-EPS Enabled 32.8%

Total of 19.5 Mio vehicles

2021

EPS Enabled 78.3%

Non-EPS Enabled 21.7%

Total of 24.5 Mio vehicles

2 Penetration and Unit Shipment Breakdown North America

Despite having reservations about EPS with respect to feel and feedback, the North American Market has been slowly but steadily introducing EPS as standard fitment, especially in the heavier and larger vehicles.

2013

EPS Enabled 55.8%

Non-EPS Enabled 44.2%

Total of 19.5 Mio vehicles

2021

EPS Enabled 71.1%

Non-EPS Enabled 28.9%

Total of 24.5 Mio vehicles

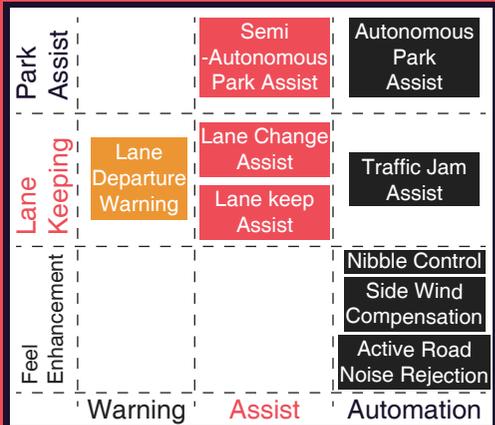
3 EPS Functionality



EPS offers a greater vehicle safety by adapting to human needs, filtering drivetrain influences, and even adjusting steering torque in critical situations.

Feel Enhancement / Lane Keeping / Park Assist in relation to Warning, Assist,

Total EPS Market : Electric Power Steering Functional Roadmap, Europe, 2013 - 2021



4 Roadmap for Automated



Level 1

Typical for vehicles with adaptive cruise control or lane keeping assist, where automation is achieved at the throttle or brakes.

Level 2

Able to operate safety functions laterally and longitudinally under constant driver supervision for speed below 30

30 mph

Level 3

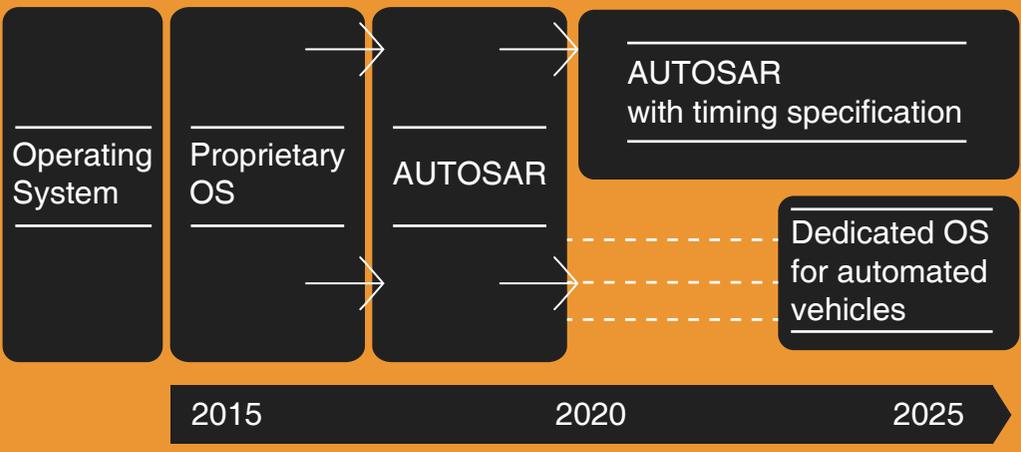
Able to operate in an automated mode with minimal driver intention at speed exceeding 30

30 mph

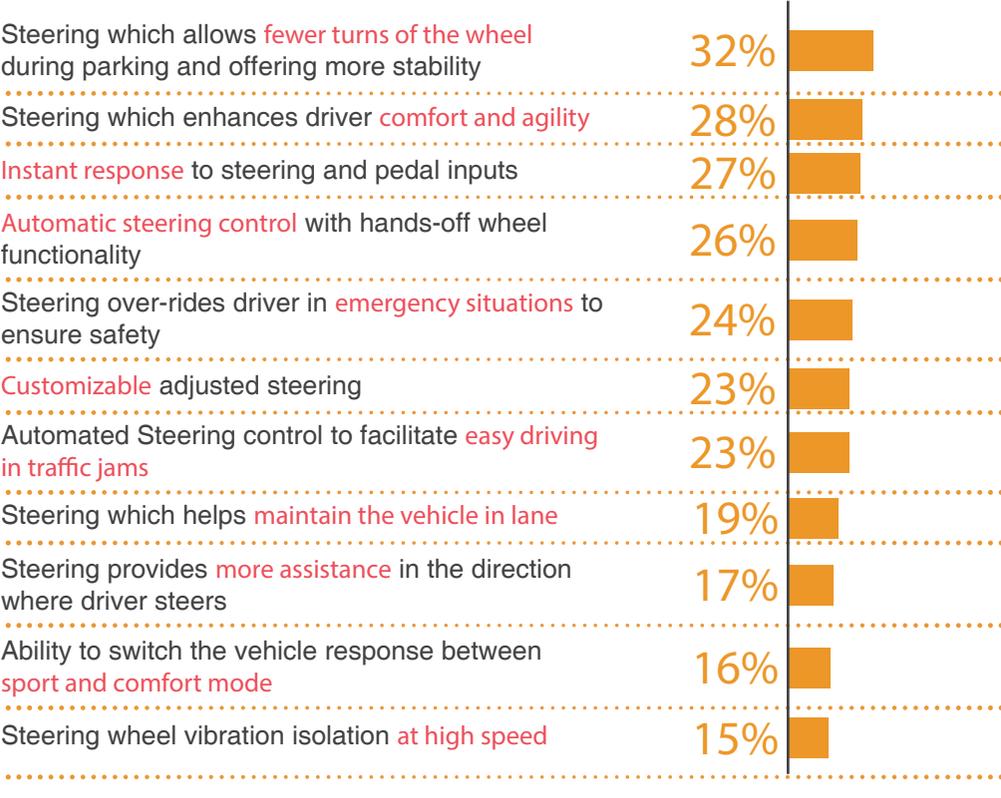
Level 4

Highly-automated driving, able to operate and take complete control of the vehicle for a specific task with no driver intervention required.

5 Controls and Software needed in Europe and North America, 2015 – 2025



6 Top Steering Features for consumers



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Download the Agenda



Source: EPS Market Overview by Frost & Sullivan, Automotive & Transportation, Nov. 2014