



November 11, 2024

Applications,

Market & Customers,

Design Wins

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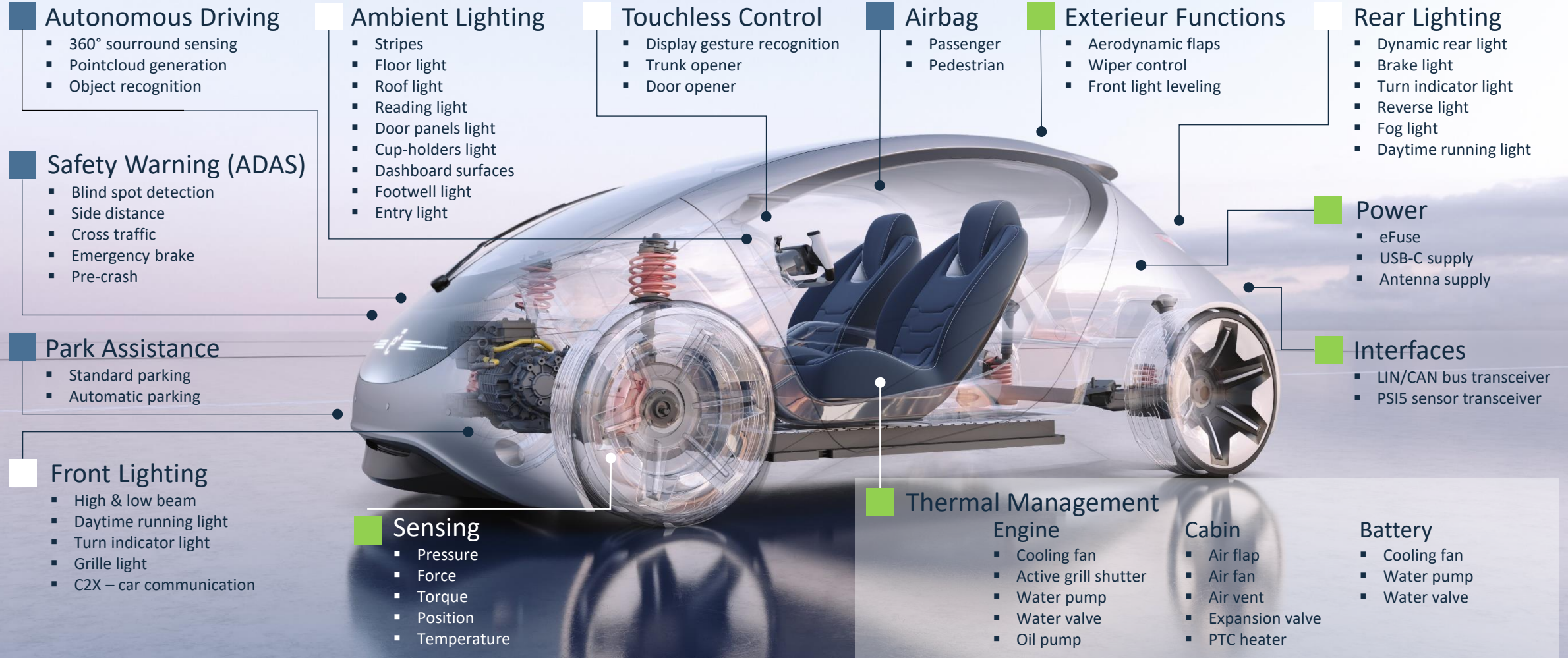


elmos | CAPITAL MARKETS  
DAY 2024

# More Efficient, More Comfortable & Safer

elmos<sup>®</sup>

■ Electrification & Efficiency   ■ Comfort & Premium   ■ Safety & ADAS



# Electrification & Efficiency – Application Examples

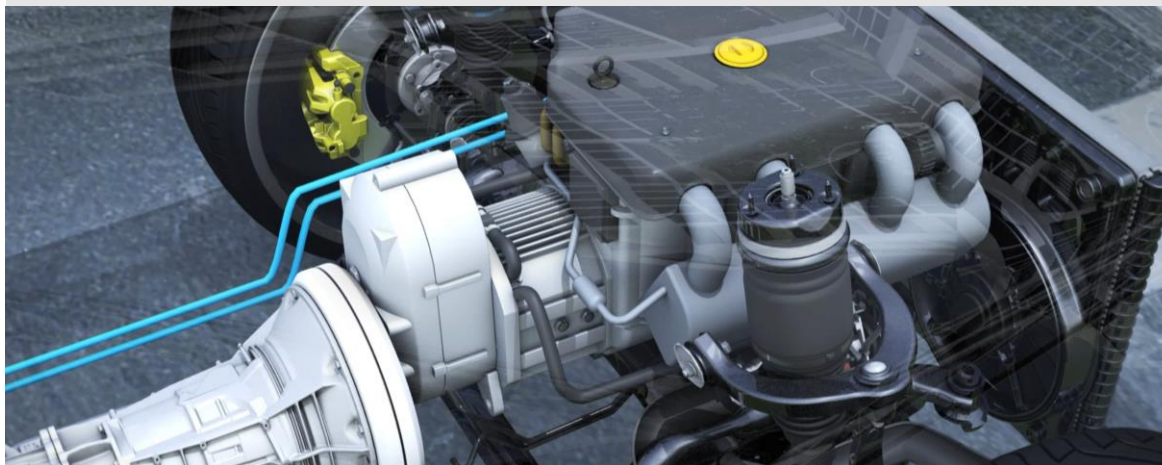
Electrical Fuse Control Enables Zonal Board Nets



Motor Control for Aerodynamic Flaps Extends Driving Ranges



In-Cylinder Pressure Sensing for Efficient Combustion



EV Thermal Management with Pump, Valve and Blower Control



# Comfort & Premium – Application Examples

Hand Gesture Detection to Control Charging Flaps



Well-being with Direct Flow Control for New Air Vents



Multi-Pixel Dynamic Front Lighting Applications



Ambient RGB LED Control for Surface Lighting



# Safety & ADAS – Application Examples

## 360° Environment Detection for Reliable Safety



## Hands-On Steering Wheel Sensing for L2-L4 Autonomous Driving



## Safe Airbag Firing Control for L1-L5 Autonomous Vehicles



## Dashboard Ambient Light Control for Safety Warnings



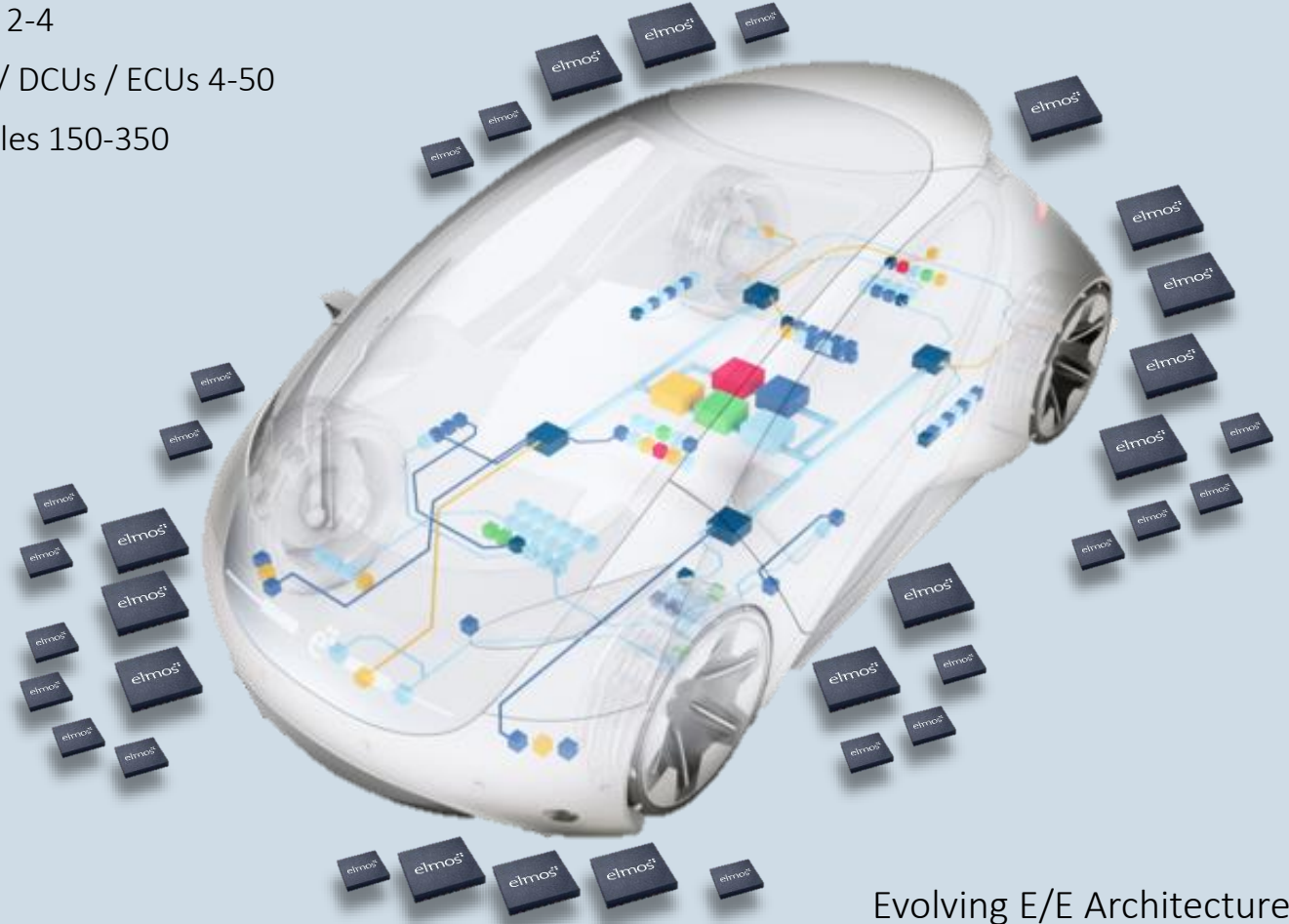
# At the Edge M/S ICs Do the Sensing & Control the Action

## Elmos Products: Mixed Signal ICs (M/S)

- Already supplied over 6 billion M/S ICs for the global automotive industry
- M/S ICs are edge devices, bridging the physical and the digital world
- Integrating analog, digital, memory and control functions in a single chip
- M/S ICs sense physical quantities, process digital data, run intelligent software, control electrical actuators and are connected to the vehicle network via high-speed interfaces
- The evolving E/E architectures of modern Software Defined Vehicle (SDV) platforms contain more and more M/S ICs for sensors, actuators, power supplies and interface devices

## Centralized / Domain / Zonal Architecture

- Zones 2-4
- CCUs / DCUs / ECUs 4-50
- Modules 150-350



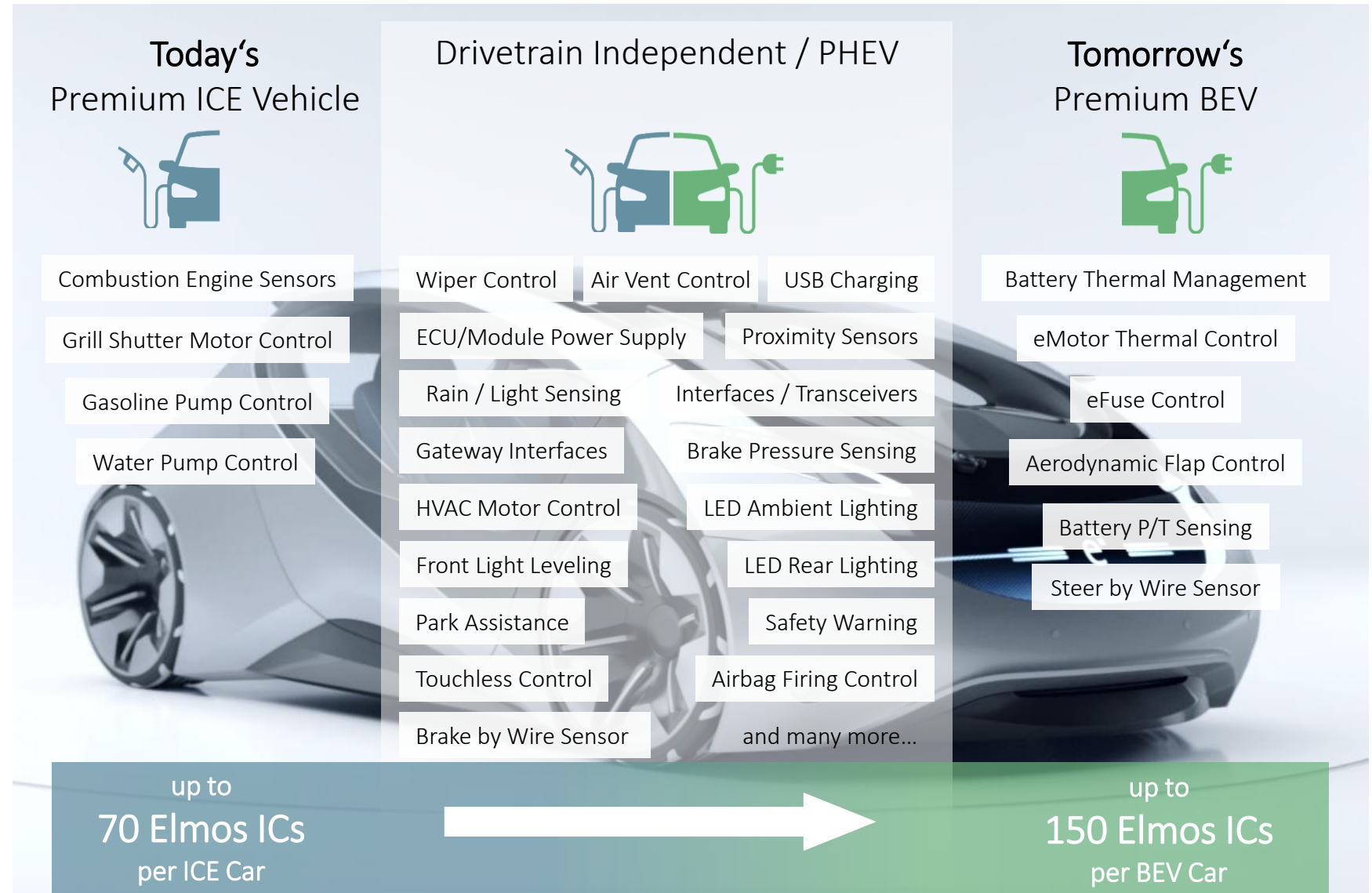
Evolving E/E Architecture of  
Next-Gen Automotive Platforms

# BEV Car Platforms Supporting Further Demand Growth



## Internal Combustion Engine (ICE) vs. Battery Electric Vehicle (BEV)

- On average 8 Elmos ICs per every new car produced globally
- Vast majority of applications addressed by Elmos is independent of drivetrain type
- Additional applications and higher maximum content of Elmos ICs in pure EV platforms
- The automotive megatrends additionally increase the growing demand for Elmos products



# Elmos ICs on the Road Everywhere

elmos<sup>®</sup>



# Elmos ICs Delivered to All Major TIER 1 Companies

elmos<sup>®</sup>



ALPSALPINE  
Perfecting the Art of Electronics

ALFMEIER

AISIN

Amphenol

• A P T I V •

ANTOLIN

BELIMO

BOSCH

Continental

DAEYANG

DENSO  
Crafting the Core

DESAY SV

DRAXLMAIER

EATON  
Powering Business Worldwide

SENSORIC

EXCELITAS  
TECHNOLOGIES

FORVIA  
HELLA

HARMAN  
A BANGOR COMPANY

JOHNSON  
ELECTRIC

JOYSON  
SAFETY SYSTEMS

KOSTAL

LEAR

LG  
Life's Good

MAHLE

MAGNA

Minebea

MITSUBISHI  
ELECTRIC  
Changes for the Better

HYUNDAI  
MOBIS

odelo  
Automotive Signal Lights

Panasonic

Sensata  
Technologies

ASPINA  
Engineered to Inspire  
Shinano Kenshi  
New Ideas in Motion

STEEL MATE  
AUTOMOTIVE

TE  
connectivity

TTE  
同致电子集团  
Tung Thih  
Electronics Group

Valeo

varroc  
EXCELLENCE

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WHETRON

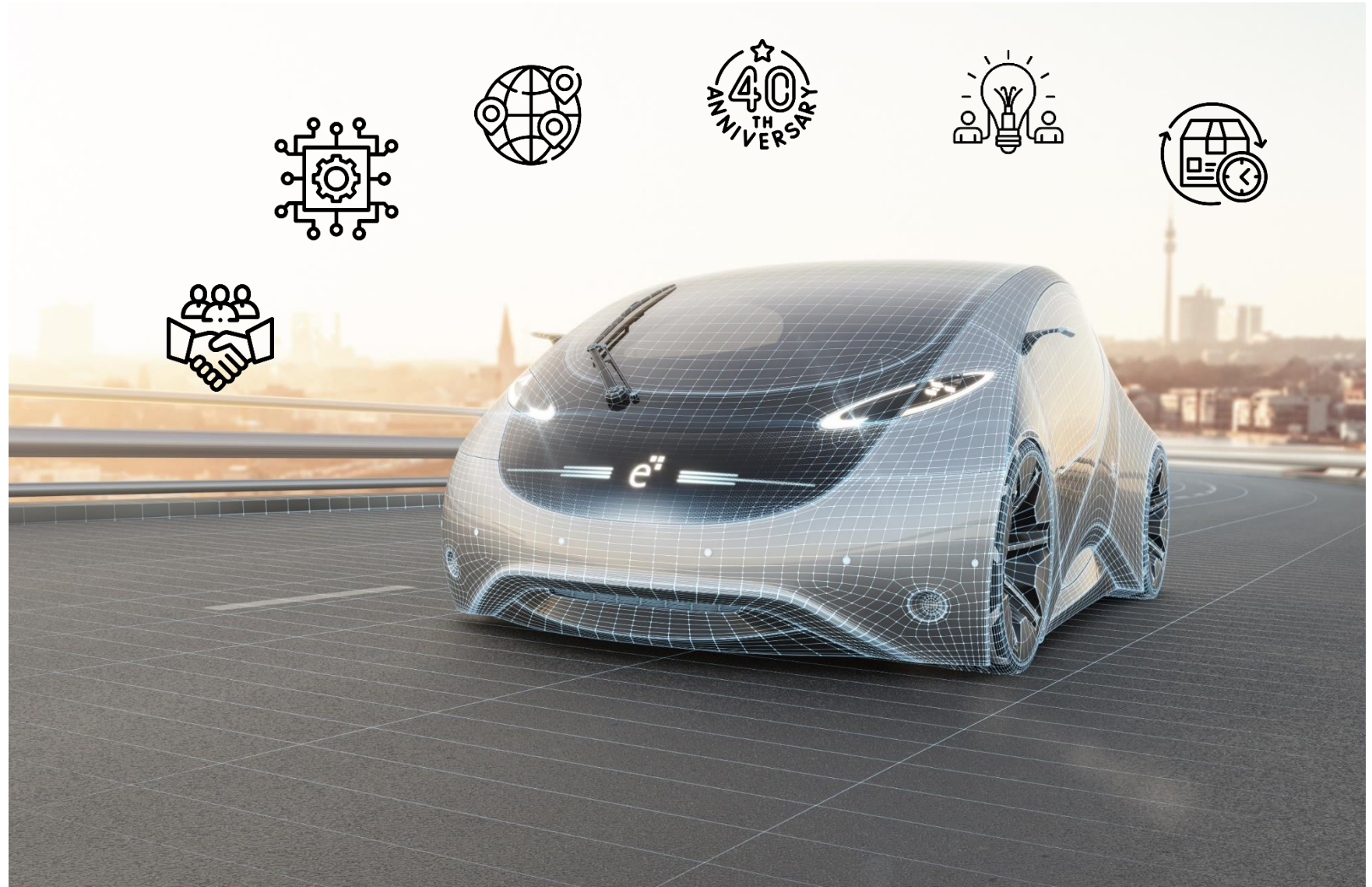
ZE

...and many more

# Strong USPs for Sustainable Profitable Growth

## Elmos Key Strengths

- Close proximity to our customers and long-standing relationships with OEMs and Tier 1s
- Strong system understanding in our focus applications
- Access to the best technology for each Mixed Signal application through a leading global foundry portfolio and partner network
- 40 years of strong technical analog/mixed-signal expertise built up over the entire automotive product life cycle
- Strong innovation culture and high patent rate
- Highest supply security

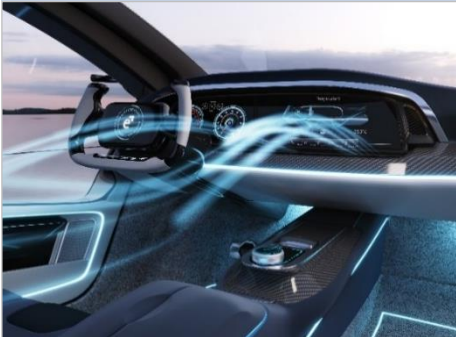


# Automotive Semiconductor Market Positions



Aiming to be the #1 Automotive IC Supplier in all of Elmos Focus Applications

Motor Control ICs for  
HVAC Actuators



**#1 Elmos**

#2 Melexis

#3 TDK Micronas

ICs for LED Lighting  
Interior and Exterior



**#1 Elmos**

#2 Melexis

#3 TI

#4 Infineon

ICs for Ultrasonic  
Parking & 360° Ranging



**#1 Elmos**

#2 Bosch

#3 OnSemi

Pressure Sensing ICs  
for Brake Systems



#1 Melexis

**#2 Elmos**

#3 Renesas

Airbag Firing ICs  
for Safety



#1 ST Micro

#2 Renesas

**#3 Elmos**

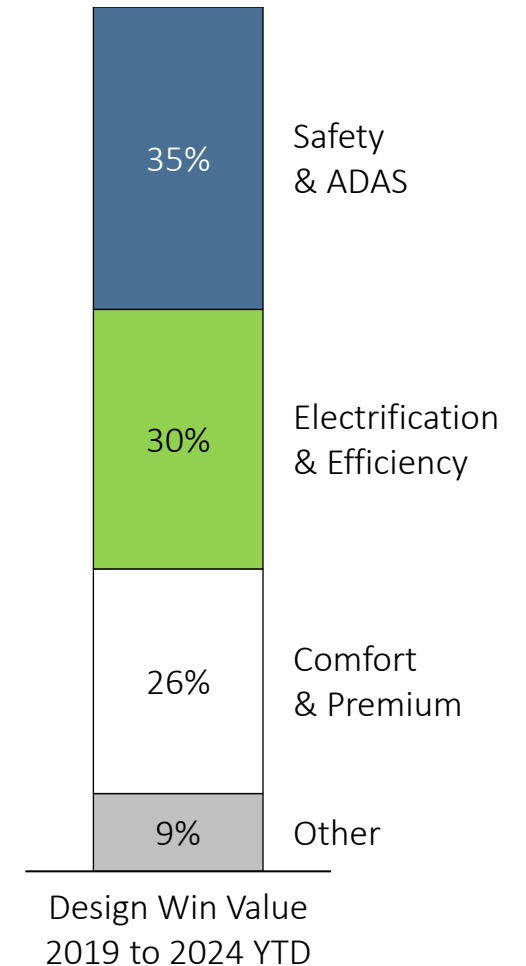
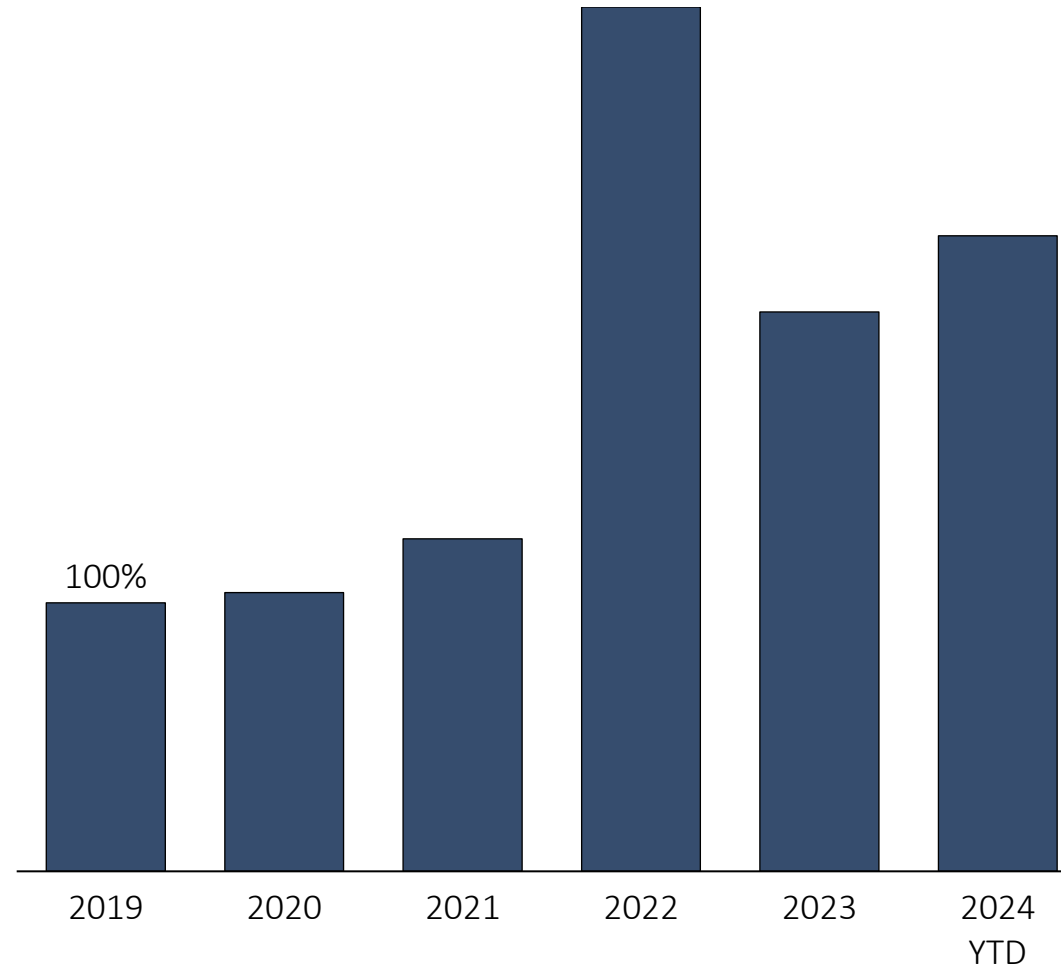
# Design Wins are Key to Sustainable Growth

## Design Wins

- Lifetime revenue of won business more than doubled since 2019
- Applications of new business quite evenly spread over the automotive megatrends
- Significant wins with major Tier1s/OEMs in all 3 application areas
- Reliably supplied to all customers during chip crisis + extraordinary win in 2022 due to additional project wins in allocation phase
- Strong design win results from the last years and further upcoming project wins will drive growth to around 1 billion Euro revenue in 2030

## Lifetime Revenue of Won Business since 2019

(Reference 2019 = 100%)



## Disclaimer

This presentation contains forward-looking statements based on beliefs of Elmos' management. Such statements reflect the company's current views with respect to future events and are subject to risks and uncertainties. Many factors could cause the actual results to be materially different, including, among others, changes in general economic and business conditions, changes in currency exchange rates and interest rates, introduction of competing products, lack of acceptance of new products or services and changes in business strategy. Actual results may vary materially from those projected here. Elmos does not intend or assume any obligation to update these forward-looking statements.

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