

HELLA PRESS CONFERENCE

OE Competence meets Diagnostics

TUESDAY, SEPTEMBER 11, 2018, 3:00 p.m.

Dr. Werner Benade

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Business Division Aftermarket & Special Applications

Dr. Andreas Habeck

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HELLA AFTERMARKET:

Partner for Wholesalers and the Workshop's Friend

Partner for Wholesalers

- Sale of **own and third-party spare parts** to IAM wholesalers
- Flexible logistics solutions through **worldwide logistics hubs** and **professional services**, e.g. data management and claim management
- **Sales presence in >25 countries**

#1-3



AFTERMARKET*

Sales: €1.2 billion // Employees: 4,549

The Workshop's Friend

- Premium provider of **workshop solutions, diagnostic tools** and advanced **equipment** to workshops
- Offering of **professional services**, e.g. technical data/hotline, trainings & financial services

▪ Market position:

#1



#3

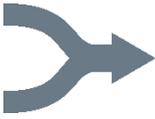


* fiscal year 2017/2018



FUTURE OF THE AFTERMARKET:

Five major trends are driving the business

	Consolidation	<ul style="list-style-type: none">▪ Accelerating formation of even larger, internationally operating wholesalers in Europa▪ Increasing importance of OE competencies
	Digitalization	<ul style="list-style-type: none">▪ Higher availability of vehicle condition data▪ Increasing maintenance frequency as well as new business models
	Car Ownership	<ul style="list-style-type: none">▪ Increasing number of repairs due to higher mileage and careless driving▪ Higher price pressure for mobility services supports the IAM
	Electrification	<ul style="list-style-type: none">▪ Higher complexity due to different electrification levels▪ Lower repair cost and maintenance frequency for electric vehicles
	Autonomous Driving	<ul style="list-style-type: none">▪ Lower number of repairs due to ADAS functions▪ Rising demand for camera and sensor calibration tools

HELLA AFTERMARKET STRATEGY:

Focus on core competencies and new business models



Grow in key product groups

- **Expand business** in HELLA core product areas **lighting** and **electrics/electronics**
- **Extend business** with professional **workshop equipment**



Add new business models and services

- Further develop **repair solutions**: diagnostics & calibration
- Build **mobility solutions** business models to serve the digital Aftermarket value chain



Focus & simplify

- **Sale of wholesale activities** in Denmark and Poland to Mekonomen
- **Streamline product range** e.g. transfer of Behr Hella Service thermal management business to Mahle at the end of 2019



INDUSTRY
TRENDS

Shaping the Independent Aftermarket



SHAPING THE INDEPENDENT AFTERMARKET:

Parts, repair solutions and mobility solutions by HELLA



**„HELLA is the Partner for Wholesalers and the Workshop's Friend,
making day-to-day business faster, more profitable and future-proof.“**



PARTS SUPPLIER:

Strong OE competence in Lighting and Electronics

LIGHTING



Rear combination lamps with OLED technology



Adaptive LED Matrix headlamps



Car body lighting for radiator grille illumination



Customizable dynamic ambient lighting functions



ELECTRONICS

77 GHz radar for driver assistance systems



48 Volt DCDC converter for energy management



Body electronics such as radio transmitter keys



Sensors such as rain-light-climate sensors



PARTS SUPPLIER:

OE know how transfer and innovative workshop products



LIGHTING

- Wide range of **vehicle-specific lighting**
- **Lighting Electronics**
- High-power **LED work- and auxiliary lights** as well as **LED beacons**
- Modular lamp series **Shapeline**
- **Bulbs** with high program coverage



ELECTRONICS

- **Radar sensors** for several driver assistance systems
- **Rain-light sensors** with flexible integration and compact design
- **Intelligent battery sensor** for optimized energy management
- **Key remote container**



WORKSHOP PRODUCTS

- **Diagnostic devices** for all applicable manufacturer brands and for over 35,000 model variants
- **Exhaust emission measurement** with updates to take on any prospective statutory changes
- **Testing and adjustment tools** Camera and Sensor Calibration (CSC-Tool), Headlamp adjustment (SEG beam setter), Battery management (BPC-Tool)

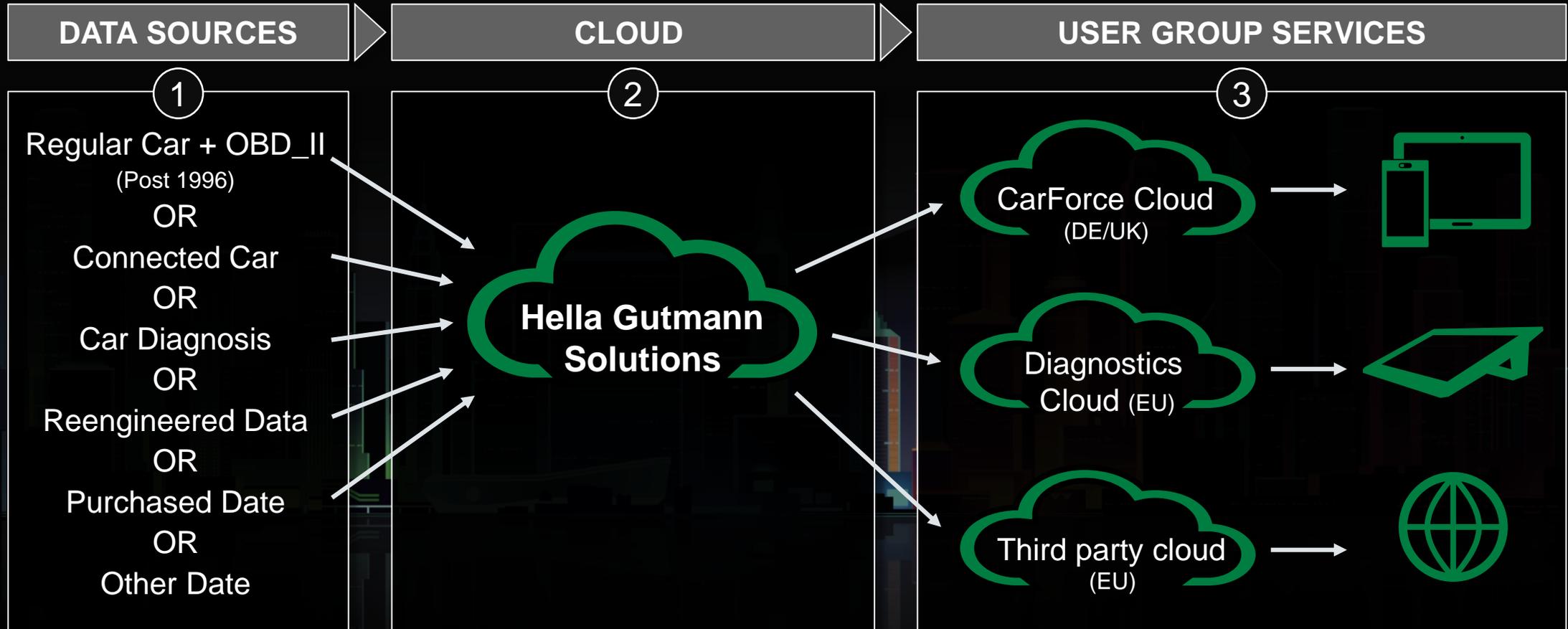
REPAIR SOLUTIONS:

Guiding the hand on the vehicle throughout the entire work process



MOBILITY SOLUTIONS:

HELLA provides intelligent car data & connected services



HELLA AFTERMARKET: OE competence meets diagnostics

IAM

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PARTS SUPPLIER	REPAIR SOLUTIONS	MOBILITY SOLUTIONS
<ul style="list-style-type: none">▪ Lighting▪ Electronics▪ Electrics ▪ Thermal Management▪ Brakes	<ul style="list-style-type: none">▪ Diagnostics & Guided Repair▪ Adjustment & Calibration	<ul style="list-style-type: none">▪ Fleet▪ Workshop▪ Insurances



**THANK YOU
FOR YOUR ATTENTION!**



BUSINESS.



SIMPLIFIED.

