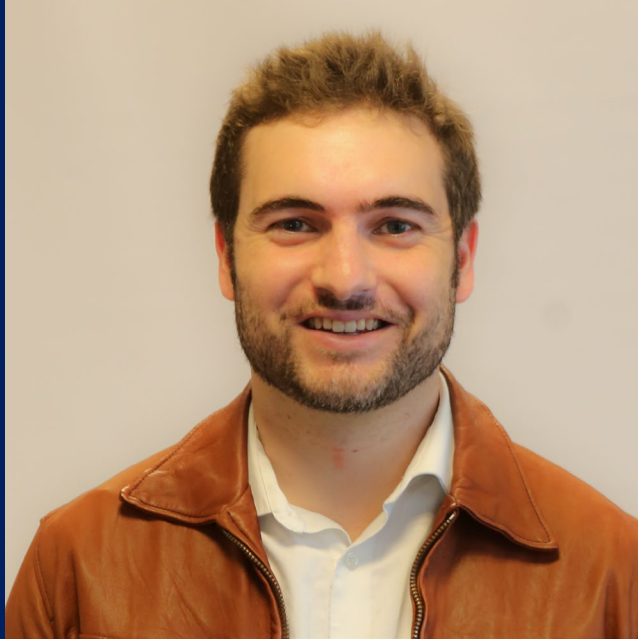




Vehicle Tech

2024





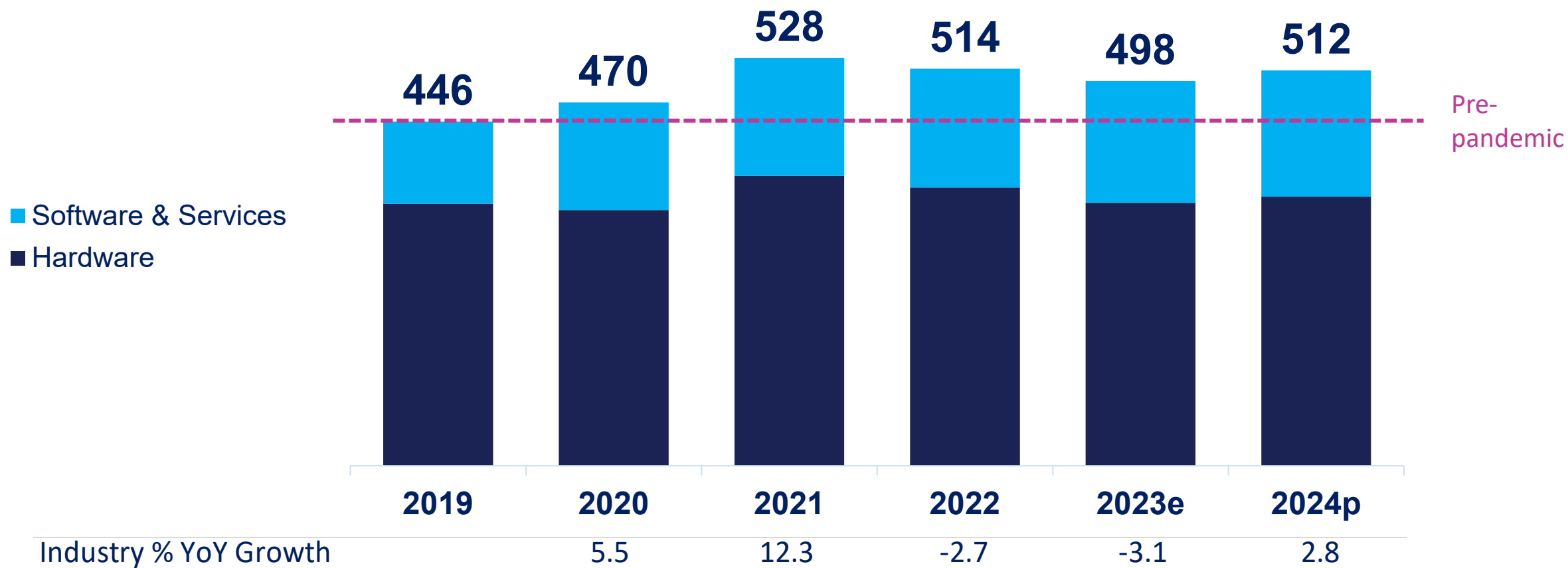
Brian Comiskey
Senior Director of Innovation
and Trends



TODAY

Forecasting U.S. Consumer Tech Spend

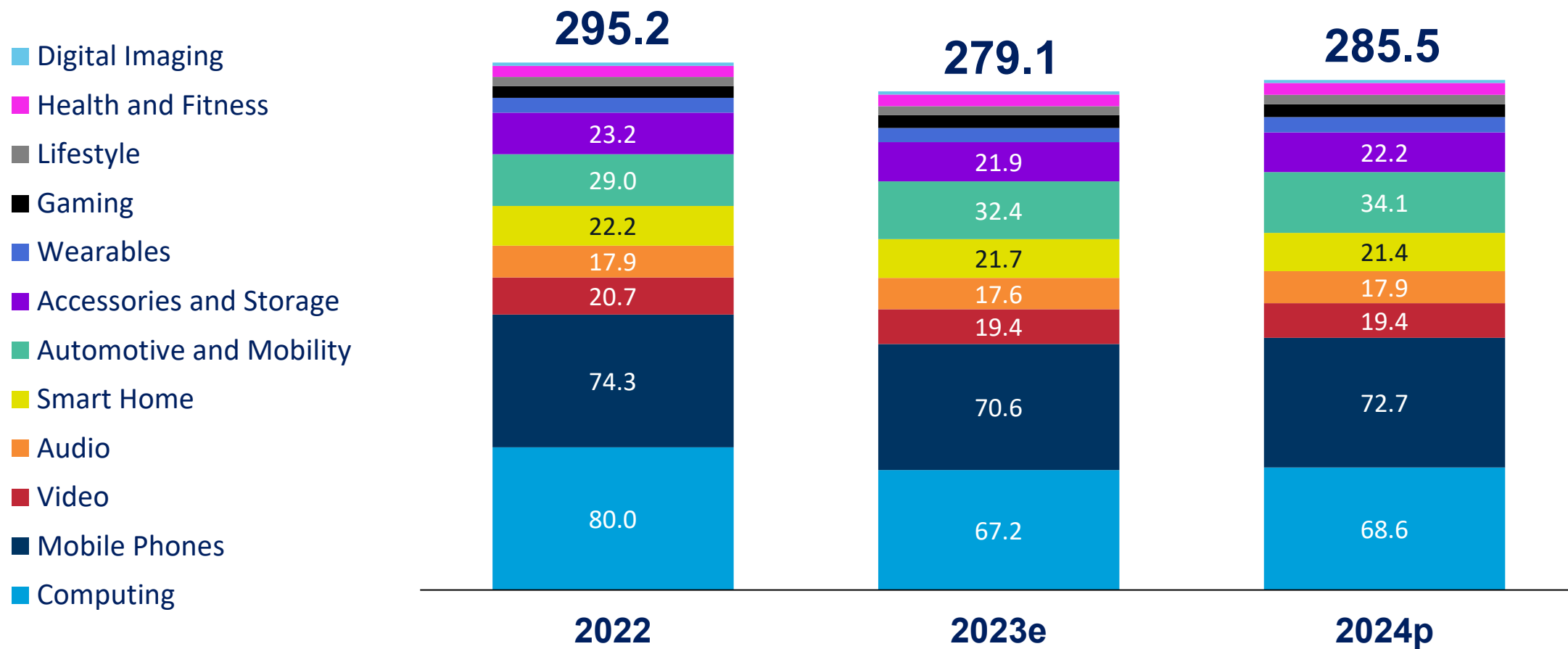
Retail Revenues, \$ Billion



e=estimate p=projection

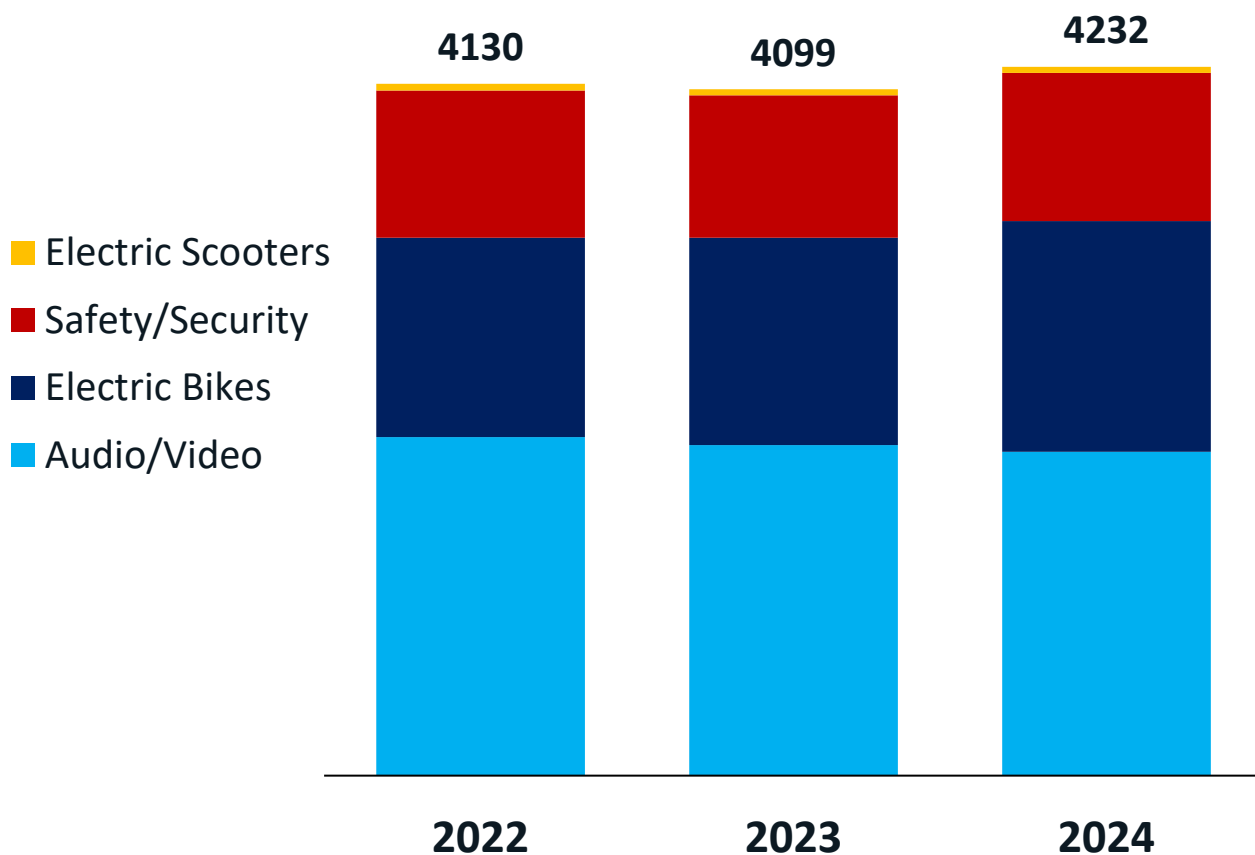
Growing Automotive Spend

Retail Revenues, \$ Billion



Examining the Mobility Aftermarket

Aftermarket Automotive and Mobility
(\$ Millions)



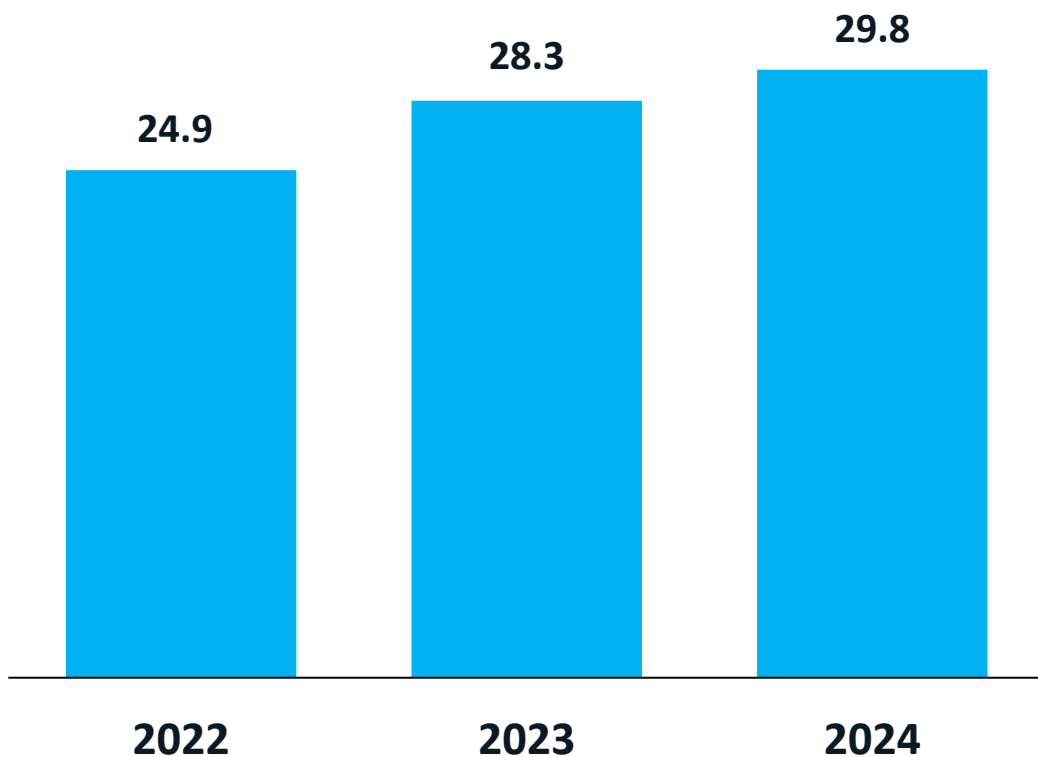
Shipment Revenues (\$ Millions)

YoY Change

Product	2022	2023	2024	2023	2024
Automotive Aftermarket	2,899	2,825	2,817	-3%	0%
Safety and Security	878	851	884	-3%	4%
Audio/Video	2,022	1,974	1,934	-2%	-2%
Personal Mobility	1,230	1,274	1,414	4%	11%
Electric Scooters	40	37	37	-6%	0%
Electric Bikes	1,190	1,237	1,377	4%	11%
Total	4,129	4,100	4,232	-1%	3%

The Engine of Auto Production

OEM Automotive Tech (\$ Billions)



U.S. Automotive Production (Thousands)

Product	2022	2023	2024	2025	2026	2027	2028
ICE	11,868	12,703	12,245	11,375	10,096	9,156	7,774
Hybrid	897	1,144	1,501	1,788	2,317	2,856	3,380
BEV	828	1,022	1,422	2,275	3,145	3,696	4,394
PHEV	207	381	632	813	993	1,092	1,352
Total	13,800	13,085	12,877	12,188	11,089	10,248	9,126

ICE - Internal Combustion Engine

Hybrid - Internal Combustion Engine and Electric Motor

BEV - Battery Electric Vehicle

PHEV - Plug-In Hybrid Electric Vehicle



Digital Infrastructure Evolves

**Advancing
Connectivity**



NextG



IoT/Edge



Li-Fi



Cybersecurity



Cloud



AI & Robotics



Digital Utilities



Trends Shaping the World

Artificial Intelligence



Food

Mobility

Gaming

Sustainability



Fintech

Health

Content

Inclusivity





TOMORROW



The Future of Mobility



Expressions of Mobility

16.2%

estimated 2024 global BEV share led by China & Europe.



10x

projected increase in EV charge points through 2030.

\$300-400 Billion

potential revenue for ADAS and self-driving systems by 2035.

CES 2024 Expressions

Mode	Power	Use	User
			
Land, Sea, Air, & Beyond	Electric, Hybrid, ICE, Fuel Cell, etc.	Ag, Const, Consumer, Comm.	Driver & Driverless

Multimodal Mobility

LAND



Honda –
EV Launch

SEA



Brunswick –
Mercury 30e Electric Motor

AIR



Xpeng AeroHT –
eVTOL Flying Car



Powering the Vehicle Tech Future

ELECTRIC



**General Motors –
*Hummer EV***

HYBRID



**Ford –
*Maverick Hybrid***

HYDROGEN



**Toyota –
*Mirai***

Delivering on Consumer EV Value

VALUE



Peace of Mind



Safety



Environmental Steward



Longevity



Financial Responsibility



Consumer EV Future Enhancements

BIGGER

BETTER

FASTER

Redefining Vehicle Tech Applications



**Kubota – Agri
Concept Vehicle**



**Kia – Purpose Built
Vehicles**



**Caterpillar –
Cat 777**



**Honda –
Motocompacto**

Accelerating In-Vehicle Innovation

- Screenification
- Voice Control
- On Board Generative AI
- Commerce Platforms
- Features-as-a-Service (FaaS)



Qualcomm Snapdragon
Digital Chassis

Transformations in the User Experience

Mercedes-Benz –
Vision EQXX



Garmin –
Autoland



Xperi –
DTS Autostage



AUO – *Interactive
Transparent Window*



The Race to Widespread Self-Driving

CONSUMER



VS

ENTERPRISE

