










ESC Installation Rate 2003-HY2009 by New Car Registration

ESC Installation Rate Europe by new car registration³

	2003	2004	2005	2006	2007	2008	HY09
Europe	29%	37%	40%	43%	50%	55%	58%
 Sweden ²	15%	69%	85%	91%	96%	98%	N.a.
 Germany ¹	55%	67%	72%	77%	79%	81%	78%
 Spain ¹	25%	32%	41%	50%	57%	65%	69%
 Luxemburg ¹	N.a.	44%	50%	52%	56%	64%	69%
 UK ¹	20%	29%	36%	43%	48%	56%	59%
 Italy ¹	14%	24%	31%	35%	42%	51%	55%
 Belgium ¹	N.a.	33%	41%	42%	47%	52%	53%
 Netherlands ¹	N.a.	29%	37%	37%	43%	44%	51%
 France ¹	35%	39%	42%	43%	46%	42%	39%

Source: ¹Bosch; ² Swedish Road Administration; ³ Passenger car registrations 2003-HY09

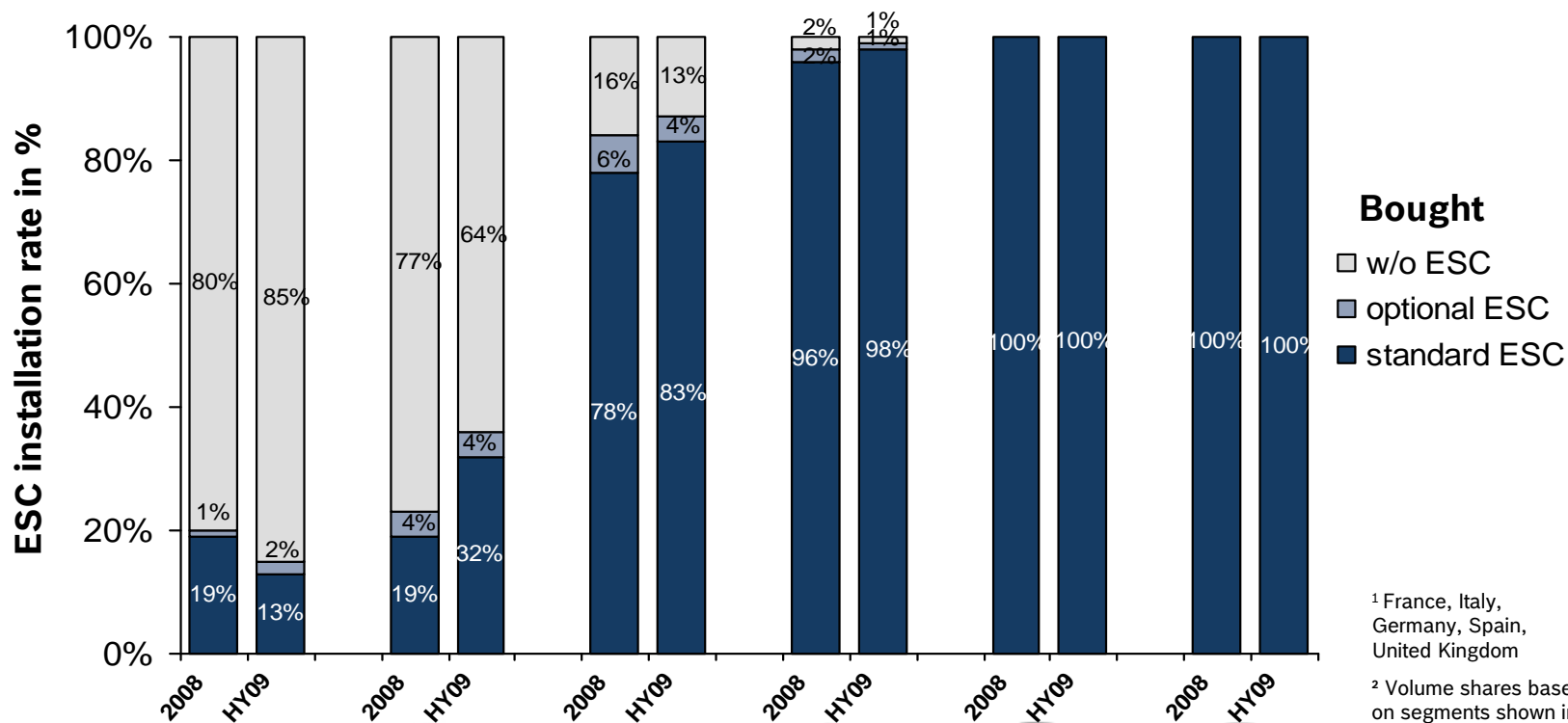
Chassis Systems Control



ESC Installation Rate 2003-HY2009 by New Car Registration

Registration

ESC Installation major European markets¹ 2008 – HY09 by car segment – optional and standard equipment



Bought

- w/o ESC
- ▒ optional ESC
- standard ESC

¹ France, Italy, Germany, Spain, United Kingdom

² Volume shares based on segments shown in chart

Source: Bosch
 Figures based on installation rates by new car registrations

Volume 2008² : 10%
 Volume HY09² : 12%

Volume 2008² : 35%
 Volume HY09² : 40%

Volume 2008² : 36%
 Volume HY09² : 33%

Volume 2008² : 15%
 Volume HY09² : 12%

Volume 2008² : 3%
 Volume HY09² : 2%

Volume 2008² : 1%
 Volume HY09² : 1%

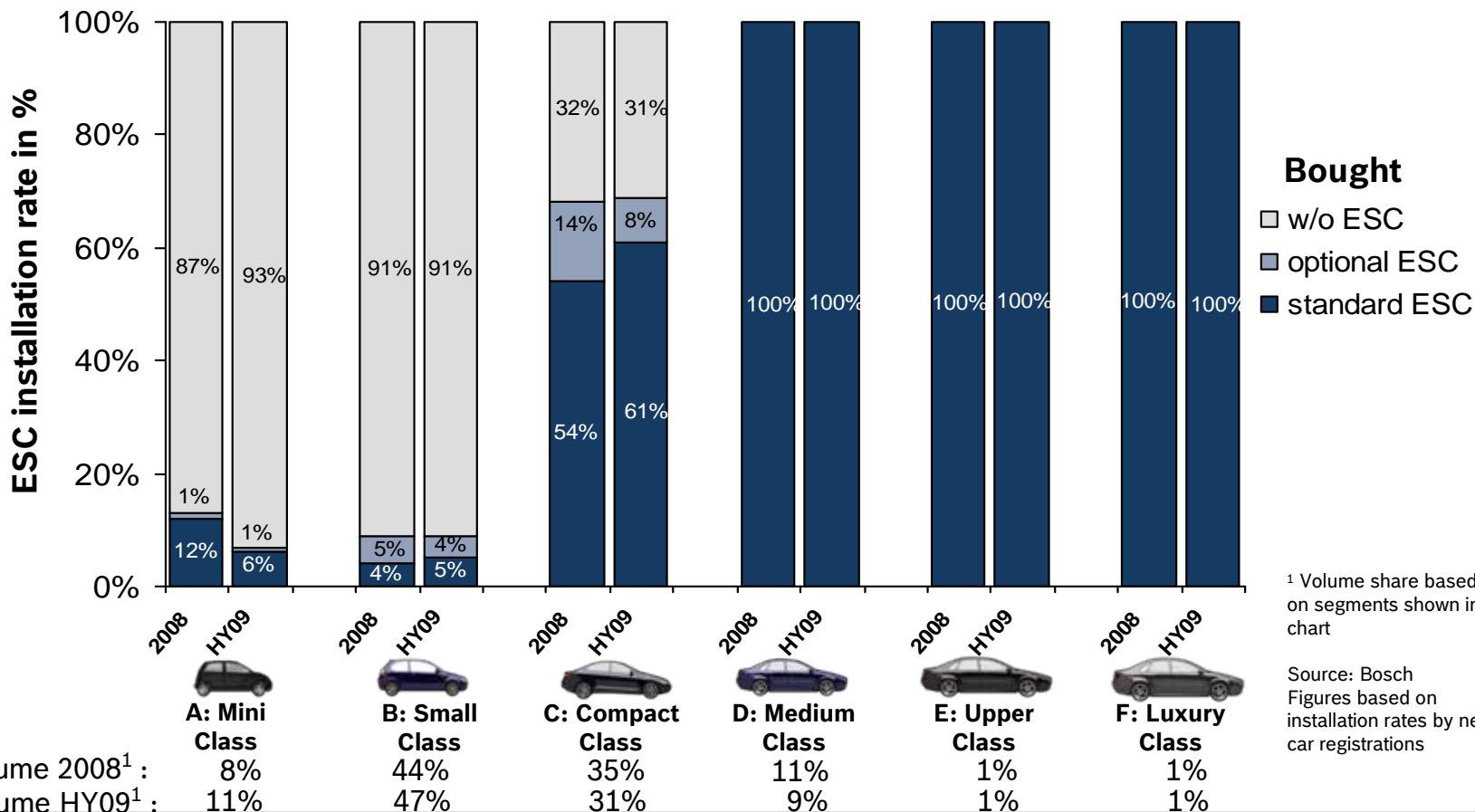
Chassis Systems Control



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ESC Installation Rate 2003-HY2009 by New Car Registration

ESC Installation France 2008 – HY09 by car segment – optional and standard equipment



Chassis Systems Control



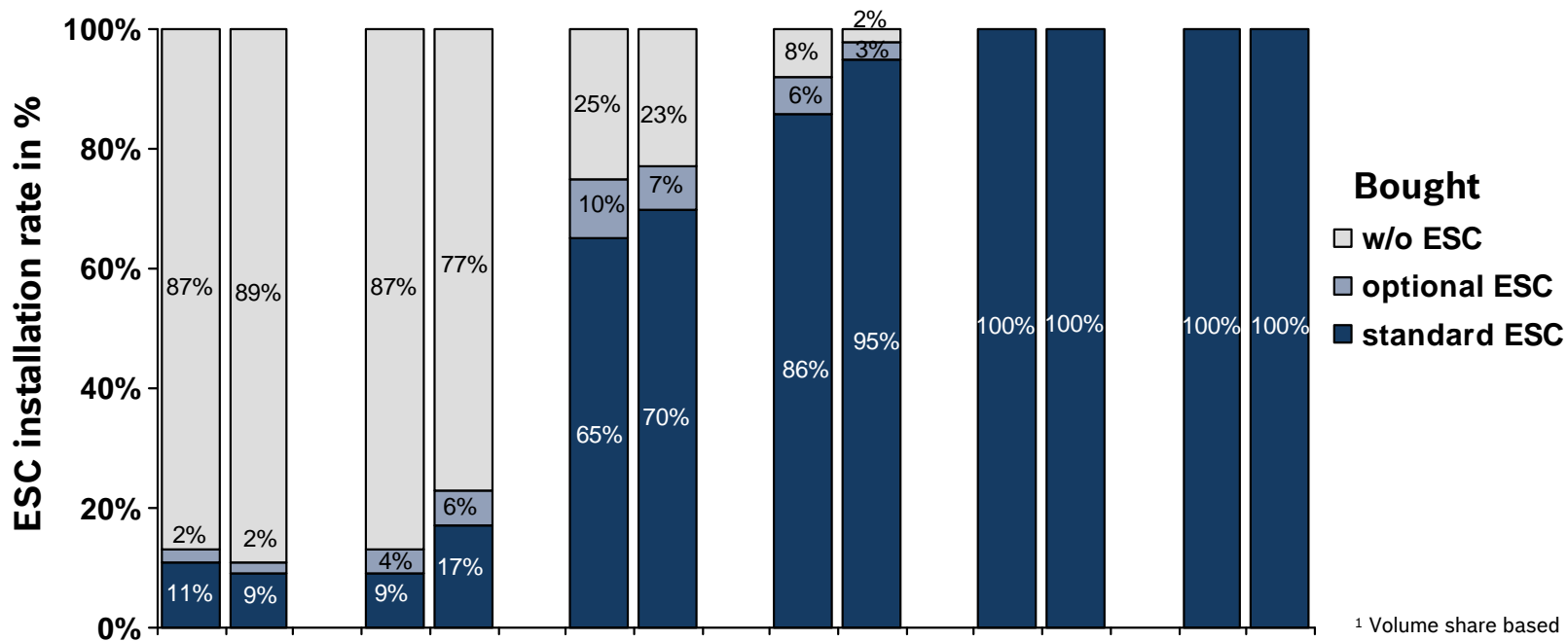
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ESC Installation Rate 2003-HY2009 by New Car

Registration



ESC Installation UK 2008 – HY09 by car segment – optional and standard equipment



¹ Volume share based on segments shown in chart

Source: Bosch
Figures based on installation rates by new car registrations

Volume 2008¹: 7%
Volume HY09¹: 9%

Volume 2008¹: 33%
Volume HY09¹: 35%

Volume 2008¹: 38%
Volume HY09¹: 34%

Volume 2008¹: 18%
Volume HY09¹: 18%

Volume 2008¹: 3%
Volume HY09¹: 3%

Volume 2008¹: 1%
Volume HY09¹: 1%

Chassis Systems Control



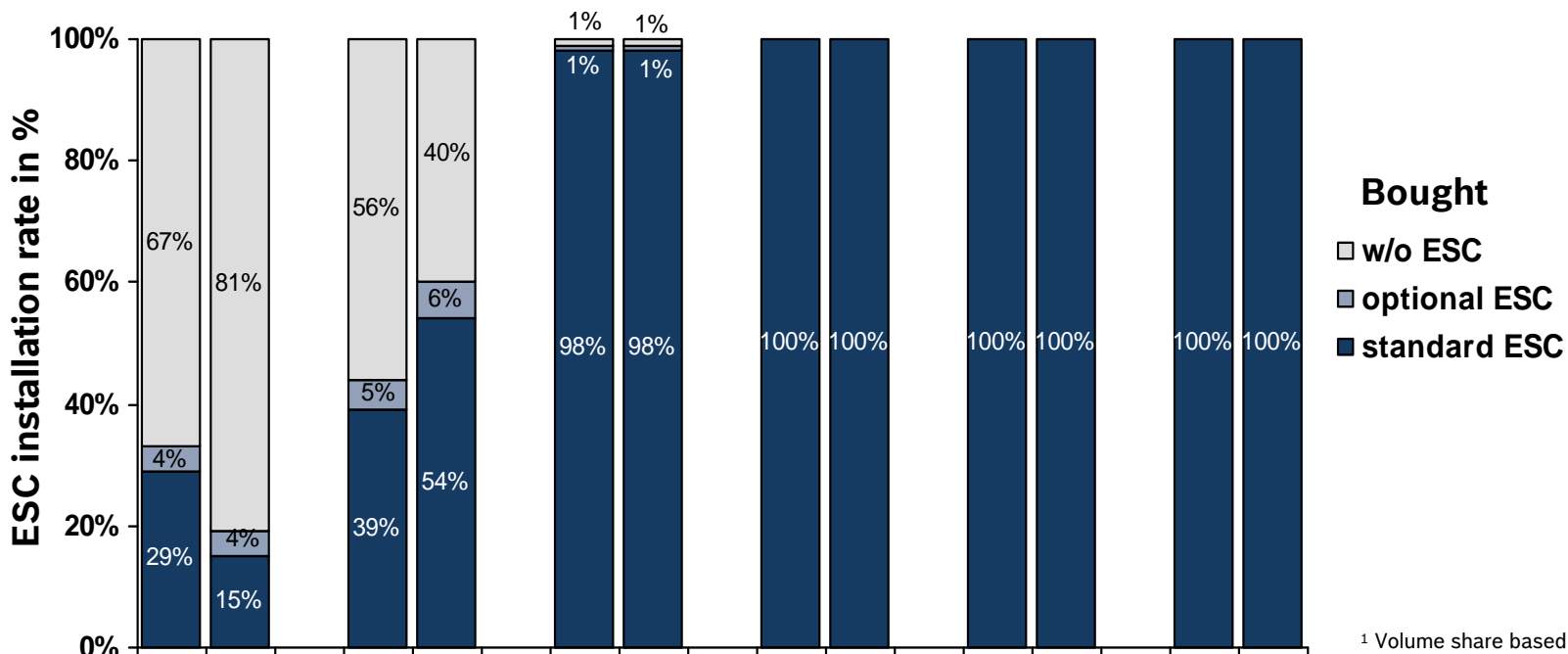
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ESC Installation Rate 2003-HY2009 by New Car Registration

Registration



ESC Installation Germany 2008 – HY09 by car segment – optional and standard equipment



¹ Volume share based on segments shown in chart

Source: Bosch
 Figures based on installation rates by new car registrations

Volume 2008¹: 6%
 Volume HY09¹: 10%

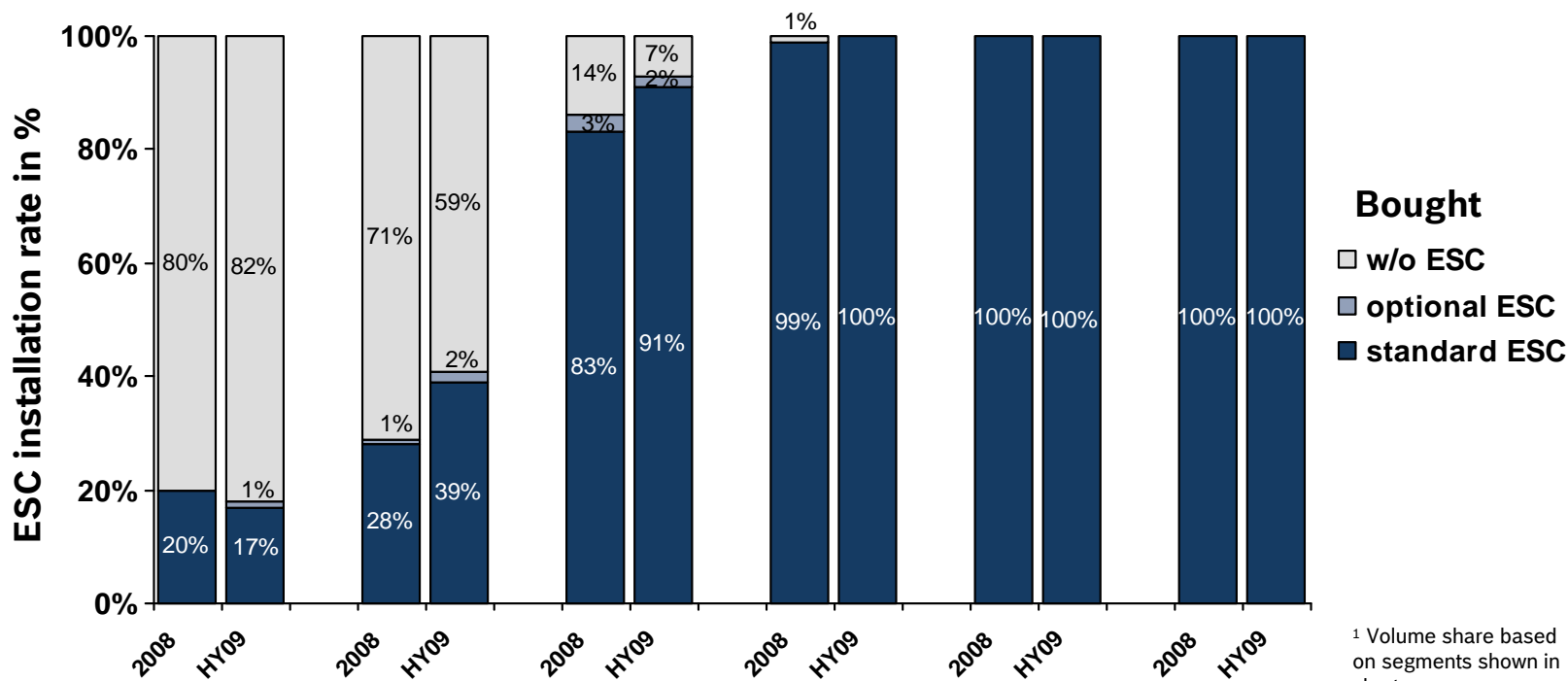
A: Mini	B: Small	C: Compact	D: Medium	E: Upper	F: Luxury
Class	Class	Class	Class	Class	Class
6%	26%	40%	21%	6%	1%
10%	36%	35%	14%	4%	1%

Chassis Systems Control



BOSCH

ESC Installation Italy 2008 – HY09 by car segment – optional and standard equipment



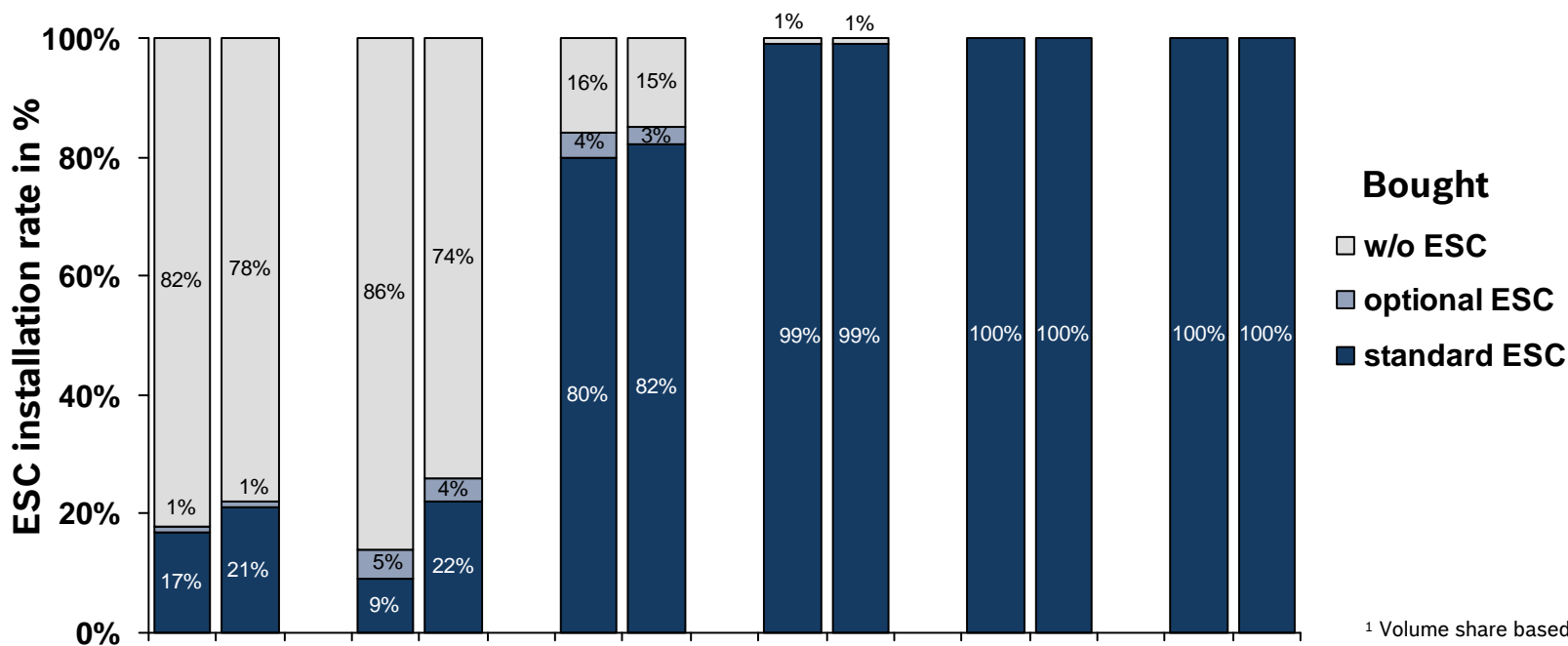
¹ Volume share based on segments shown in chart

Source: Bosch
 Figures based on installation rates by new car registrations

	A: Mini Class	B: Small Class	C: Compact Class	D: Medium Class	E: Upper Class	F: Luxury Class
Volume 2008 ¹ :	23%	41%	25%	9%	1%	1%
Volume HY09 ¹ :	25%	44%	22%	7%	1%	1%



ESC Installation Spain 2008 – HY09 by car segment – optional and standard equipment



Bought

- w/o ESC
- ▒ optional ESC
- standard ESC

¹ Volume share based on segments shown in chart

Source: Bosch
 Figures based on installation rates by new car registrations

Volume 2008¹ :
 Volume HY09¹ :

A: Mini Class

4%
 4%

B: Small Class

31%
 32%

C: Compact Class

47%
 48%

D: Medium Class

15%
 14%

E: Upper Class

2%
 1%

F: Luxury Class

1%
 1%

