



# Observations for a Better World Industrial Measurements

Vaisala Capital Markets Day, June 13, 2017

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**VAISALA**

# Industrial Measurements Markets

HIGH-END HUMIDITY

HIGH-END CARBON DIOXIDE

LIFE SCIENCE

POWER TRANSMISSION



MEGA TRENDS



Energy  
Efficiency



Well-being  
& Health



Resource  
Efficiency



Circular  
Economy



Urbanization



Sustainability  
Awareness

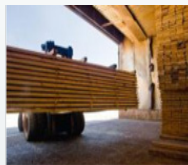
# We Help Our Customers to Improve

- Product quality
- Productivity
- Energy efficiency
- Maintenance activities
- Regulatory compliance

End Users



System Integrators



OEM



Channel with best fit to customer needs

Direct sales

Online store

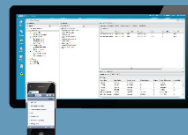
Distributors

Retailers

Industrial Transmitters

Handhelds

HVAC






OEM Modules

Continuous Monitoring Systems

Services

# Global Market Sizes and Growth 2017

MEUR	Instruments	Power Transmission	Life Science
			
<b>Market size*</b>	420-470	170-230	275-330
<b>Market growth p.a.</b>	5%	15%	10%
<b>Vaisala market share 2017*</b>	Mid	Low	Low
<b>Market size total</b>	<b>~ EUR 1 BILLION</b>		

Market share indication:

Low <10%

Mid 10-25%

High >25%

- No major changes to market overviews or growth rates
- Market sizes updated based on the growth rates

\* Vaisala estimate of the size of market that is addressable currently or with organic development in the roadmaps

# Industry Cases

**VAISALA**

# Examples of Industries We Serve

- Power Transmission
- Life Sciences
- Industrial Drying (e.g. paper)
- Electronics
- Building Automation, e.g demand controlled ventilation
- Automotive Industry
- Agriculture and Food Industry



# Power Transmission

We measure multiple gases in transformer oil.

Early indication about the possible faults in high voltage transformers.

Improves the efficiency of customers' operations, generates cost savings.





# Life Sciences

- New HPP272 probe for the measurement of vaporized hydrogen peroxide, humidity and temperature
- Unique PEROXCAP® technology for world-class repeatability
- Bio-decontamination and sterilization applications



New digital transmitter Indigo for exchangeable smart probes.

# Industrial applications

- New carbon dioxide meter GMP252 for measuring CO<sub>2</sub> in ppm levels
- Harsh environments where stable and accurate performance is required
- Agriculture, greenhouses, refrigeration and demanding HVAC applications



# Care Agreements

- Productized multi-year service agreements with prepaid priority calibration service
- Maintaining superior accuracy during the product life cycle
- Available for new and existing Vaisala instruments





## **Growth** through product leadership

- Discovering customers' needs
- Achieving #1 position in selected markets
- Continuously creating winning products

# Discovering Customers' Needs

## Growth Markets

- Strong growth potential in Life Science and Power Transmission markets
- Investments in new offering addressing the specific market needs
- Identification of new attractive growth markets

## Flagship Markets

- Strong position with our high-end humidity and carbon dioxide offering
- Continuous investments in offering development



# Achieving # 1 Position in Selected Markets

## Sales Channel

- Channel with best fit to the market
- Partner management

## Application Expertise

- Strong in-house expertise in industry demands, such as Life Science specific regulations

## Geographical Reach

- Regional go-to-market strategies
- Expansion to new regions



# Continuously Creating Winning Products

A person wearing a blue cleanroom suit and cap is seated at a workstation in a cleanroom environment. The workstation includes a computer monitor displaying data and various pieces of equipment. In the background, another person in a similar suit is walking through the cleanroom.

## Superior Products and Technologies

- Solutions that outperform competition
- Clean room sensor manufacturing and calibration
- New parameter development

## Software Development

- System software and IoT connectivity layer

## Scalability of Our Products

- Using new technologies in all suitable applications and industries to accelerate growth



# Growth Plan

- New disruptive market entries
- Leveraging expanded parameter portfolio
- Differentiation through superior product performance and cutting edge technology





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# Observations for a Better World