

Driving profitability and global leadership

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VAISALA

Global leader in weather and climate observations

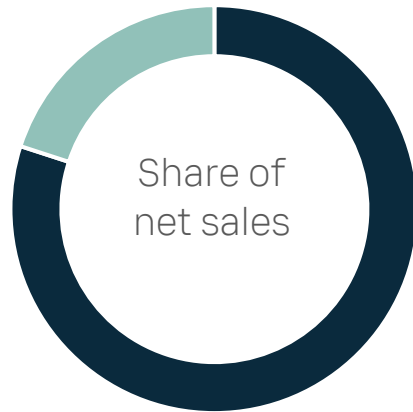
We are a global weather instrumentation leader in core markets: meteorology, aviation, defense, roads, and renewable energy. We play a vital role in understanding, mitigating, and adapting to climate risks and extreme weather.

VAISALA



Weather, Energy, and Environment markets

Weather, Energy, and Environment net sales



- Meteorology, aviation, defense & roads
- Renewable energy



Meteorology, aviation, defense & roads

Mature and stable 700 MEUR market with natural fluctuation in project business

- Climate change and severe weather create long-term need for observations
- Stable underlying governmental spend, with fluctuation in project and system business
- Growth in defense spending especially in Europe



Renewable energy

150 MEUR addressable market currently facing headwinds

- Core wind resource assessment market saturating
- Headwinds especially in offshore wind
- Expansion opportunities in wind operations
- Energy transition fundamentals remain solid long-term

Focus on profitability and growing share of services in mature weather markets

- Wave of European modernization projects coming to end; meteorology and aviation markets returning to flat growth
- Potential to grow services by increasing attach rate and monetizing large installed base and strong customer relationships
- Growth in European defense spending brings opportunities

Weather business consists of a stable base and modernization-driven projects with potential to grow recurring revenue from services



Illustrative image



Committed to sustaining profitability across market cycles

Competitive product portfolio and prioritization of R&D

Lean organization

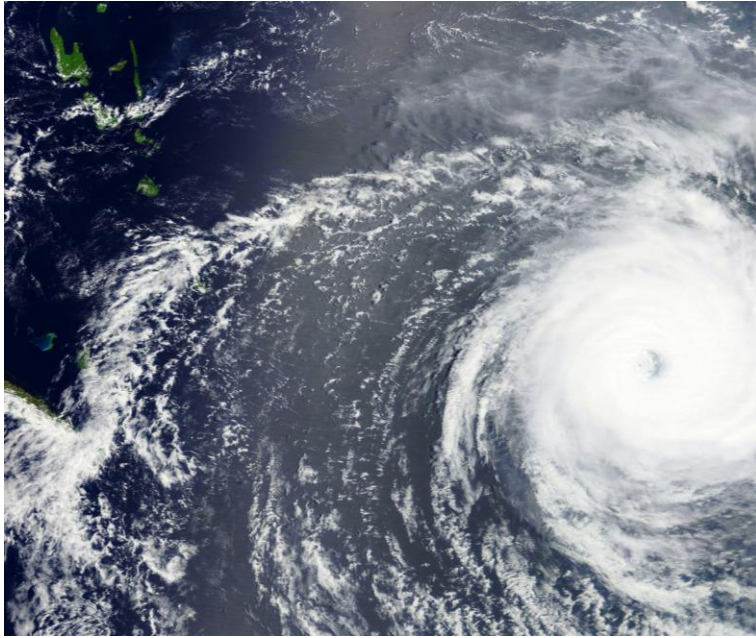
Operational efficiency with AI

Growing and scaling the service business

- We have opportunities to grow share of high-margin services through our large installed base with over 1.5 million active weather sensors and systems. We do this by
 1. growing point-of-sales services and
 2. installed base attachment rate
- We leverage our four global service centers and renewed service offering to expand footprint in selected areas.
- Digitalization, AI, and connectivity are central to improving operational efficiency.



Sharp focus to deliver profits and grow services



We continue to drive market leadership and societal impact as a global leader in weather and climate observations.



We hold profitability across market cycles by keeping clear focus and prudent R&D prioritization.



We drive recurring revenue through connectivity-enabled services to secure critical weather data availability.

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