



Undisputable Global Leader for Weather Observations

Capital Markets Day 2019

Jarkko Sairanen, EVP, Weather and
Environment Business Area

VAISALA



Leadership with a Broad Product Portfolio

CMD19

Soundings



Weather Radars



Wind Lidars



Surface Weather



Digital Solutions: "Vaisala Digital"

CMD 19

Ground
Transportation



Renewable
Energy



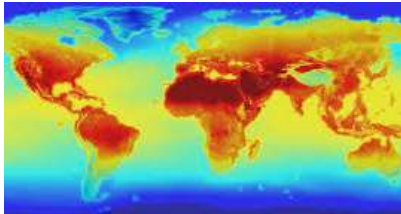
Aviation



Lightning



Key Market Trends



Climate Change

Extreme weather, climate change, and resource scarcity



Urbanization

World urbanization continuing, accelerating pollution challenges



Renewable Energy

Clean & renewable energy becoming mainstream



Protectionism

US, China, EU blocks protecting own interests (trade, data, etc.)



Public Spend Shift

Priorities and public debt impacting funding



Sustainability

Environmental sustainability becoming a purchase criteria



Future of Mobility

Drones, autonomous cars & ships becoming reality



Hyperconnectivity

Always on hyperconnectivity for everything (cars, infra, etc.)



New Data Capture

Nano satellites, cars, airplanes, mobile networks acquire data



Open Data & AI

Environmental data becoming more open & leveraged by AI

Weather and Environment Global Market Sizes and Growth

	Meteorology Infrastructure	Transportation	Renewable Energy	Ambient Air Quality
MEUR				
Market Size*	450–500	300–500	330–380	150–200
Market Growth p.a.	0%	0-5%	>10%	>5%
Vaisala Market Share 2018	High	High	Mid	Low
Market Size Total	~1,300 / ~20% Market Share			

Market share indication:

Low <10%

Mid 10–25%

High >25%

*) Weather and Environment
Global Market Sizes and Growth

Weather and Environment Strategy Pillars

Industry Leading Products

extending to supplementary observations

Large Projects

with outstanding delivery capability

Digital Solutions

for chosen weather critical operations

Environmental Measurements

through selective expansion

“Fireworks” of New Products

CMD19



Wind Lidar Opportunity

Several customer segments

- Renewable energy
 - Turbine control
 - China play
- Aviation
- Meteorology, air quality

Leverage synergies

- Vaisala sales channel
- Core “engines”



Large Projects: Unique Capability

**Bahamas
Capacity
Building**



**Argentina
Automated
Weather
Observing
System**



**Vietnam
Capacity
Building**



**Sweden
Road Weather
Information
System**





Digital Future in Roads

All-year value proposition

- Cracks and potholes

Intelligent fleets

- Connected infotainment
- Autonomous vehicles

System solution capabilities

- Sensors, networks
- Impact analysis, decision support
- Installation and service

Supplementary Air Quality Networks

Environmental expansion

- Smart cities
- Hotspots like harbors

Growing offering

- Sensors as core
- Visualization and modelling software
- Spearhead applications



Key Strategic Objectives

Continuously improve the core business

- Renew through instruments
- Expand to all weather radar bands
- Extend into supplementary sensors
- Simplify where possible

Drive growth opportunities at hand

- Wind lidars
- Digital solutions for chosen weather critical operations
- Ambient air quality

Capability and competence development

- Agility in product and solution creation
- “B2B-like” sales skills and culture
- Marketing competence to the next level
- Outstanding project delivery capabilities
- Embrace digital transformation
 - In offering as well as in operations
- Best customer delight across all touch points

Undisputable Global Leader for Weather Observations



Observations for a Better World

VAISALA