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

### Market Size and Growth

<table>
<thead>
<tr>
<th>MEUR</th>
<th>Instruments (MEUR)</th>
<th>Power Transmission (MEUR)</th>
<th>Life Science (MEUR)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Market size</td>
<td>420-470</td>
<td>170-230</td>
<td>275-330</td>
</tr>
<tr>
<td>Market share 2017</td>
<td>Mid</td>
<td>Low</td>
<td>Low</td>
</tr>
<tr>
<td>Market growth p.a.</td>
<td>5%</td>
<td>15%</td>
<td>10%</td>
</tr>
</tbody>
</table>

### Market Size Total

- ~ EUR 1 BILLION

### Market Share Indication

- **Low**: <10%
- **Mid**: 10–25%
- **High**: >25%

### Notes

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

* Vaisala estimate of the size of market that is addressable currently or with organic development in the roadmaps.
Industry Cases
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
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 CO₂ 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
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

Continuously Creating Winning Products
Growth Plan

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

- Discovering customers’ needs
- Achieving #1 position in selected markets
- Continuously creating winning products
Observations for a Better World