Small Devices, Big Impact.

Belimo
Company Presentation 2021
Our Products
Seamless integration of innovative HVAC field-devices

**Damper Actuators**
- Non Fail-Safe Actuators
- Fail-Safe Actuators
- Outdoor Protected Actuators
- Quick Running Actuators
- Linear Actuators
- Fire and smoke control damper actuator

**Control Valves**
- Energy Valves
- Pressure Independent Control Valves
- Characterized Control Valves
- Butterfly Valves
- Globe Valves
- Zone Valves
- Piping Packages

**Sensors**
- Pipe Sensors (Water)
- Duct Sensors (Air)
- Outdoor Sensors (Air)
- Room Sensors

**Performance Devices**
- Belimo Energy Valve™
- Belimo ZoneEase™ VAV

**Retrofit**
- Fire and smoke control damper actuator
- Damper Actuators
- Control Valve/Actuators
- Butterfly Valve/Actuators
- Globe Valve/Actuators
- Economizer
Applications
Heating, ventilation and air conditioning in buildings
We Serve Two Main Channels in HVAC
OEM and contracting

Contracting (55 %)
- Controls contractors
- Systems integrators
- Controls distributors

OEM (45 %)
Manufacturers of HVAC equipment like:
- Air handling units
- Boilers
- Dampers
- Etc.

Consulting Engineers
- Developers
- General Contractors
- Mechanical Contractors

End users
- Owners
- Tenants
- Real estate companies

BELIMO Automation AG
Belimo sales companies
End-Customer Segments
Belimo products in every third commercial building

Commercial Buildings
Government Buildings
Airports
Hotels
Data Centers
Universities / Schools
Belimo Company Facts
Successful by focusing on HVAC field devices

Founded: 1975
Headquarters: Hinwil Switzerland

Listed at the Swiss Stock Exchange since 1995.

Over 100 million actuators for the control of HVAC in the field.

1,900 employees worldwide in over 80 countries on all continents.

We invest more than 7% of our sales every year in research and development.

Global market leader in the development and production of field devices for the regulation and control of HVAC systems.
Our Key Figures
A continuous success story

Net Sales 2001-2020
In CHF million

Belimo 2021
Our Key Figures
With CHF 661 million sales we are the market leader in field-devices

Net Sales by Application

<table>
<thead>
<tr>
<th>Application</th>
<th>In %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Water</td>
<td>44</td>
</tr>
<tr>
<td>Air</td>
<td>56</td>
</tr>
<tr>
<td>Total</td>
<td>100</td>
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</tbody>
</table>

Net Sales by Region

<table>
<thead>
<tr>
<th>Region</th>
<th>In %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Europe</td>
<td>49</td>
</tr>
<tr>
<td>America</td>
<td>38</td>
</tr>
<tr>
<td>Asia Pacific</td>
<td>13</td>
</tr>
<tr>
<td>Total</td>
<td>100</td>
</tr>
</tbody>
</table>
Executive Committee
A leadership team with over 140 years of HVAC experience
Group Structure
Three strong regions supported by global functions

Executive Committee

Americas
J. Furlong

Europe
L. Eigenmann

Asia Pacific
G. Economides

Innovation
Dr. E. Cortona

Finance and Business Services
Dr. M. Schürch

Production
L. Scheidegger

Logistics / Customization
A. Wethli

Strategy and Brand Management
A. Staufer

Global Quality
G. Seekirchner

Belimo 2021
Sites Around the Globe
Close to our customers. In more than 80 countries.

Regional Headquarters
Subsidiaries
Representatives, Franchising Partners
Americas Locations
Over 400 Belimo people serving our customers

Mississauga, Ontario, Canada
Belimo Canada Office & Warehouse

Danbury, CT USA
Belimo Americas Regional Headquarters
Office, Production & Logistics/Customization Hub
198,000 Sq. Ft.

Sparks, NV USA
Belimo Americas
Office & Logistics/Customization Hub
19,850 Sq. Ft.

Sao Paulo, Brazil
Belimo Brazil
Office & Logistics Hub

Total Americas Employees: 470
Asia Pacific Locations
Fast growing Belimo organization with 300 people

- **Mumbai, India**
  - Belimo India
  - Office & Logistics/Customization Hub
  - 2,000 sqm

- **Shanghai, P.R. China**
  - Belimo China
  - Office & Logistics/Customization Hub
  - 5,005 sqm

- **Hong Kong, P.R. China**
  - Belimo China, Asia Pacific Regional Headquarters
  - Office & Logistics/Customization Hub
  - 1,900 sqm

- **Kuala Lumpur, Malaysia**
  - Belimo Malaysia
  - Office & Logistics/Customization Hub
  - 1,355 sqm

- **Melbourne, Australia**
  - Belimo Australia
  - Office & Logistics/Customization Hub
  - 1,090 sqm

**Total Asia Pacific Employees:** 300

Regional Headquarters
Subsidiaries
Representatives, Franchising Partners
Europe Locations
Covering the European market

Belimo Norway
Belimo Finland
Belimo Sweden
Belimo Poland
Belimo Austria
Belimo Turkey
Belimo Italy
Belimo UAE

Belimo Switzerland
International Headquarters

Belimo Germany
Belimo Netherlands
Belimo France
Belimo United Kingdom
Belimo Spain

Employees: Representatives, Franchising Partners

Employees: Representatives, Franchising Partners
- Belimo Switzerland: 120

Employees: Total Belimo Europe
- Total Employees: 1130
- Regional Headquarters: 1
- Subsidiaries: 13
- Representatives, Franchising Partners: 13
Our History
Key milestones on our 45 year long history

1975
Foundation of Belimo Automation AG Switzerland

1976
Creation of first direct coupled actuator

1984
Introduction of the variable air volume controllers (VAV).

1992
Introduction of the brushless direct current motor. Actuators contain a microprocessor for the first time.
Our History
Key milestones on our 45 year long history

1995
Safety actuators and variable air volume controllers were updated. The tight connection between mechanics and electronics results in attractive products.

1999
Creation of the Characterized Control Valve (CCV)

2003
Creation of Pressure Independent Valve Technology (PICCV)

2005
The new generation of actuators without safety position is introduced within the following three years.
Our History
Key milestones on our 45 year long history

2009
Creation of the 6-Way Characterized Control Valve (6-Way CCV)

2012
Creation of the Belimo Energy Valve™

2015
Introduction of the ZoneTight product range

2016
IoT product range of cloud-enabled products
Our History
Key milestones on our 45 year long history

- **2016**
  - Launch of the new actuator and valve assembly for high flow rates including smartphone diagnostics via NFC.

- **2016**
  - Introduction of the new actuator for variable air volume control — Belimo ZoneEase™ VAV.

- **2017**
  - Introduction of the Belimo Sensors product range

- **2019**
  - Launch of room sensors
Belimo Value Creation Model
Successful customers ultimately lead to a successful Belimo
Operational Excellence
Focus on final assembly, testing & customization. Rely on partners.

- **Sourcing**
  - Commodity 53%
  - Specialist 30%
  - Partner 17%
  - 86% of production costs

- **Assembly**
  - 10%

- **Logistics/Customization**
  - 4%
Operational Excellence
Our commitment to quality

- Every actuator is extensively tested before delivery. In 2019 7.2 million tested actuators left our factory.

- Our specialized know-how and the "Swiss quality" make a five-year warranty on the entire range possible.
Megatrends
Driving higher demand in comfort, energy efficiency and safety

- Urbanization
- Climate Change
- Digitalization

Higher demand in Comfort, Energy Efficiency and Safety in buildings
Our Purpose
What we want to impact

COMFORT
Create more comfort and health for people in buildings.

ENERGY
Contribute to higher energy efficiency of buildings with visible energy savings.

SAFETY
Provide technology that saves lives and minimizes damage to buildings and assets.

INSTALLATION
Make installations easier and the commissioning faster.

MAINTENANCE
Assure long lifetimes and minimal maintenance efforts for HVAC controls equipment.
Basic requirements for HVAC systems for healthy indoor air
7 essentials of a healthy building

1. Continuous and reliable measurement, display and monitoring of indoor air quality
2. Accurate amount of air to the zone and controlled removal of contaminated air
3. Well designed air dilution and airflow pattern
4. Active pressurization of envelope and spaces
5. Correct temperature and humidity conditioning
6. Effective filtration
7. Proper amount of outside air
Our contribution to “Safety” – Healthy Indoor Air
For the better health of future generations

Belimo contributes to healthy indoor air with:

- Accurate and reliable room and duct sensors
- VAV solutions for demand-controlled ventilation
- Fast-acting actuators and tightly closing valves
- Belimo Energy Valve™ for precise and stable control, energy measurement and monitoring
- Seamless BMS and cloud-platform integration
Application Examples
Air handling units

Belimo’s devices enable the precise and efficient conditioning of air in buildings, for example:

- Actuators safely control outside air or bypass dampers
- Temperature, humidity and air quality sensors measure the room comfort
- Pressure sensors assure the right air flow and identify dirty filters
Application Examples
Heating water plants

Belimo devices control the generation and the flow of hot water in a building in an energy-efficient way, for example:

- Temperature Sensors measure the condition of the supply and return water
- Energy Valves control and monitor the flow of thermal energy to the building
- Butterfly valves stage hot water boilers based on the demand
- Pressure sensors assure sufficient water pressure in the piping system
Belimo safety actuators save lives and help to minimize damage to buildings and tangible assets, for example:

- Fire damper actuators seal off fire-rated compartments against the spread of fire and smoke through the ventilation duct.

- Smoke control damper actuators enable the mechanical smoke extraction from escape and rescue routes.
Belimo's devices provide a comfortable room environment that is essential for the well-being and productivity of people:

- Room sensors measure the temperature, humidity and air-quality in the room
- Variable Air Volume actuators provide the right amount of fresh air to the room
- 6-way valves precisely control the flow of cold/hot water to a chilled/heated ceiling
- ZoneTight valves control water flow to a fancoil and close it completely tight if no demand exists
Solution Leadership in HVAC Field Devices
Innovations in water for the success of our customers

Belimo Energy Valve™

The Belimo Energy Valve™ is an IoT cloud-connected valve that monitors energy consumption while maintaining Delta T. It sets new standards for the smart control of thermal flow in HVAC systems and helps to reduce the operating cost in buildings and CO₂ emissions ([watch the movie](#)). Since its market launch in 2012, it has received over 20 awards from industry organizations worldwide.
Solution Leadership in HVAC Field Devices
Innovations in air for the success of our customers

Belimo ZoneEase™ VAV

The most innovative VAV-solution to simplify the commissioning process.

It provides commissioning support via the cloud and the Belimo Assistant App. ZoneEase™ reduces the project complexity and the commissioning time substantially and automatically documents all configuration settings. The progress of a VAV-job gets fully transparent.
Solution Leadership in HVAC Field Devices
Innovations in sensors for the success of our customers

**Room Sensors**
The Foundation of Comfort

- Timeless design
- Fast installation
- Easy configuration

**Belimo Ultrasonic Flow Sensor**
Flow Measurement that You Can Trust

- Accurate and reliable
- Patented glycol measurement and compensation
- Compact design
- Easy installation
- Accurate results without drift
Solution Leadership
Belimo IoT-ready products and the Belimo eco-system
We are where you need us, speak your language and understand you.

Complete product range with shortest delivery time in the industry.

5-year warranty and tested quality.

Award winning service to assist customers quickly and effectively, either remotely or on-site.

Belimo Added Values
More than just products
Belimo Retrofit
The best replacement solution

- Our retrofit tool enables you to find retrofit products based on a variety of parameters. It is a quick and simple tool providing you with fast HVAC replacement solutions.

- The Belimo retrofit tool is available as an App. The App is free and is available from the iTunes store or Google Play.
Credibility Culture
Hands-on training in the Belimo Experience Centers