

**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

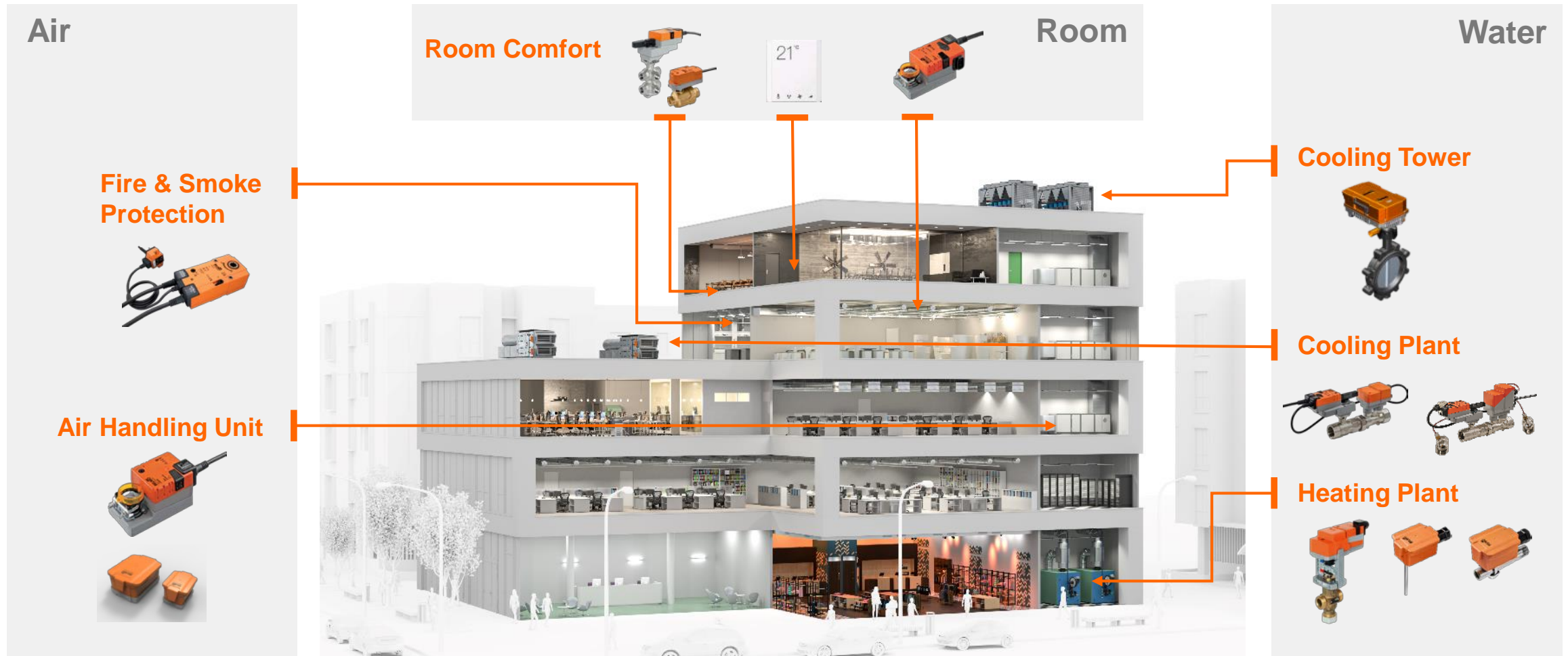
Retrofit



- Fire and smoke control damper actuator
- Damper Actuators
- Control Valve/Actuators
- Butterfly Valve/Actuators
- Globe Valve/Actuators
- Economizer

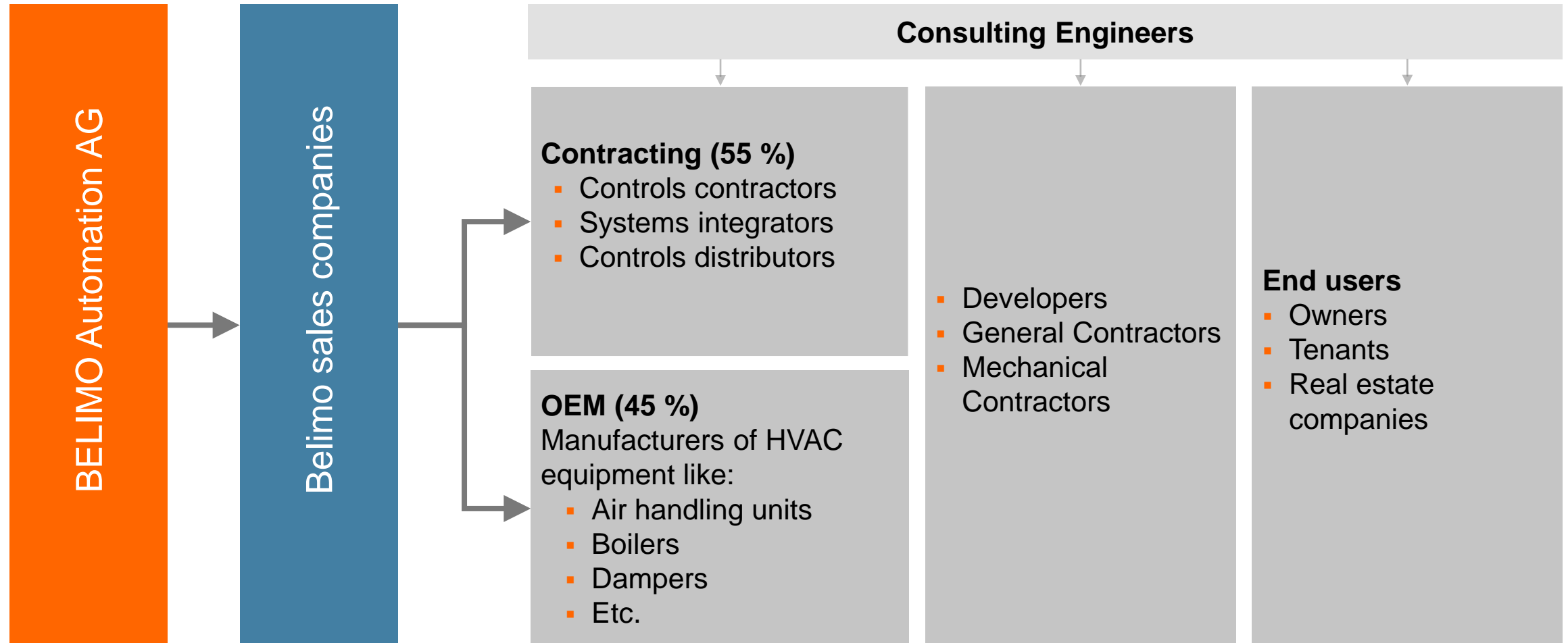
Applications

Heating, ventilation and air conditioning in buildings



We Serve Two Main Channels in HVAC

OEM and contracting



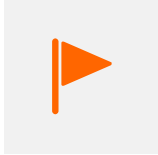
End-Customer Segments

Belimo products in every third commercial building



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.

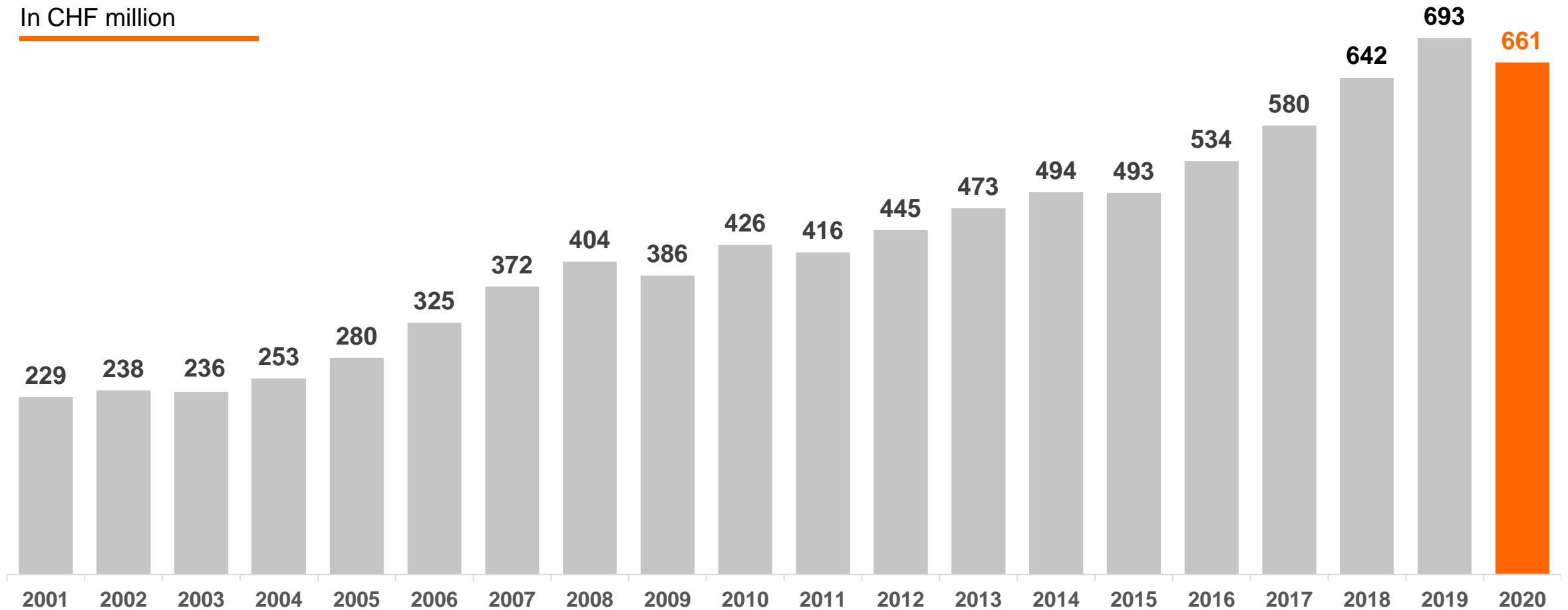
Our Key Figures

A continuous success story



Net Sales 2001-2020

In CHF million

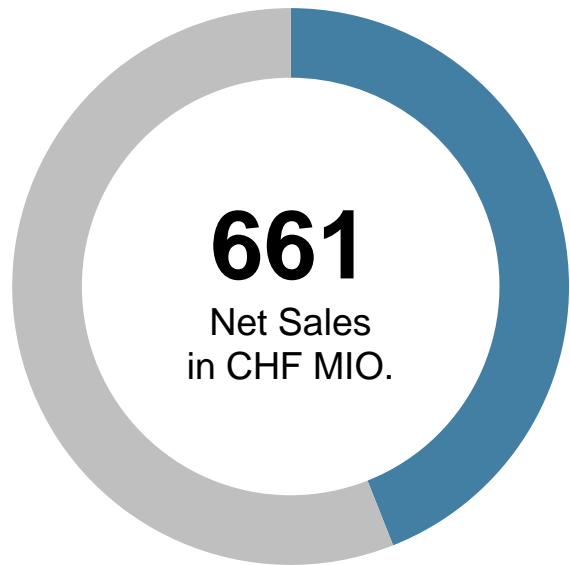


Our Key Figures

With CHF 661 million sales we are the market leader in field-devices

Net Sales by Application

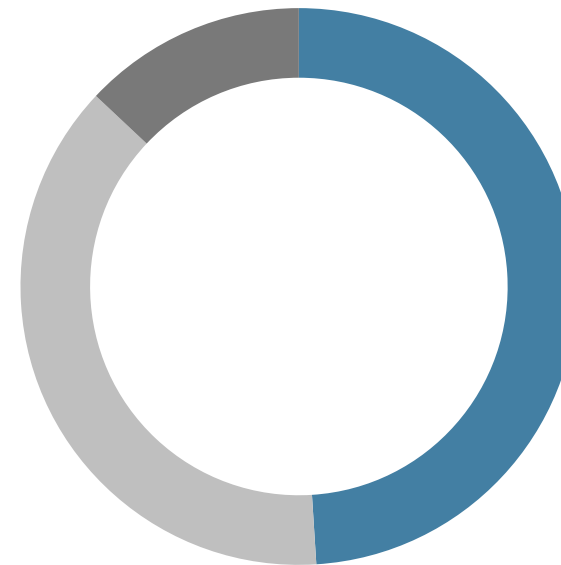
In %



■ 44 Water ■ 56 Air

Net Sales by Region

In %



■ 49 Europe ■ 38 America
■ 13 Asia Pacific

Group Executive Committee

A leadership team with over 140 years of HVAC experience



Jim Furlong

Head of Americas

Gary Economides

Head of Asia Pacific

Markus Schürch

Chief Financial Officer

Lars van der Haegen

Chief Executive Officer

Louis Scheidegger

Head of Group Division
Production

Lukas Eigenmann

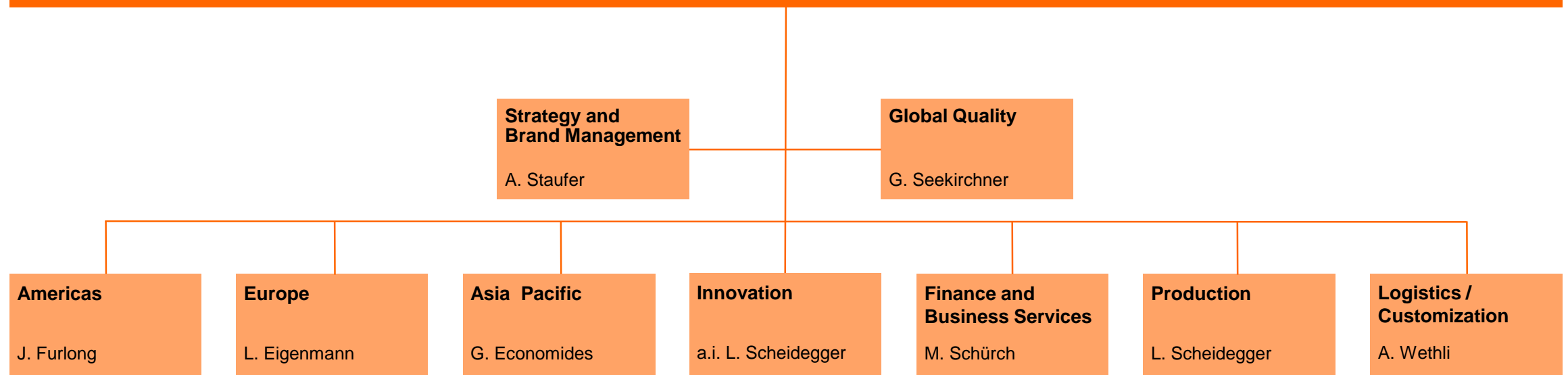
Head of Europe

Group Structure

Three strong regions supported by global functions

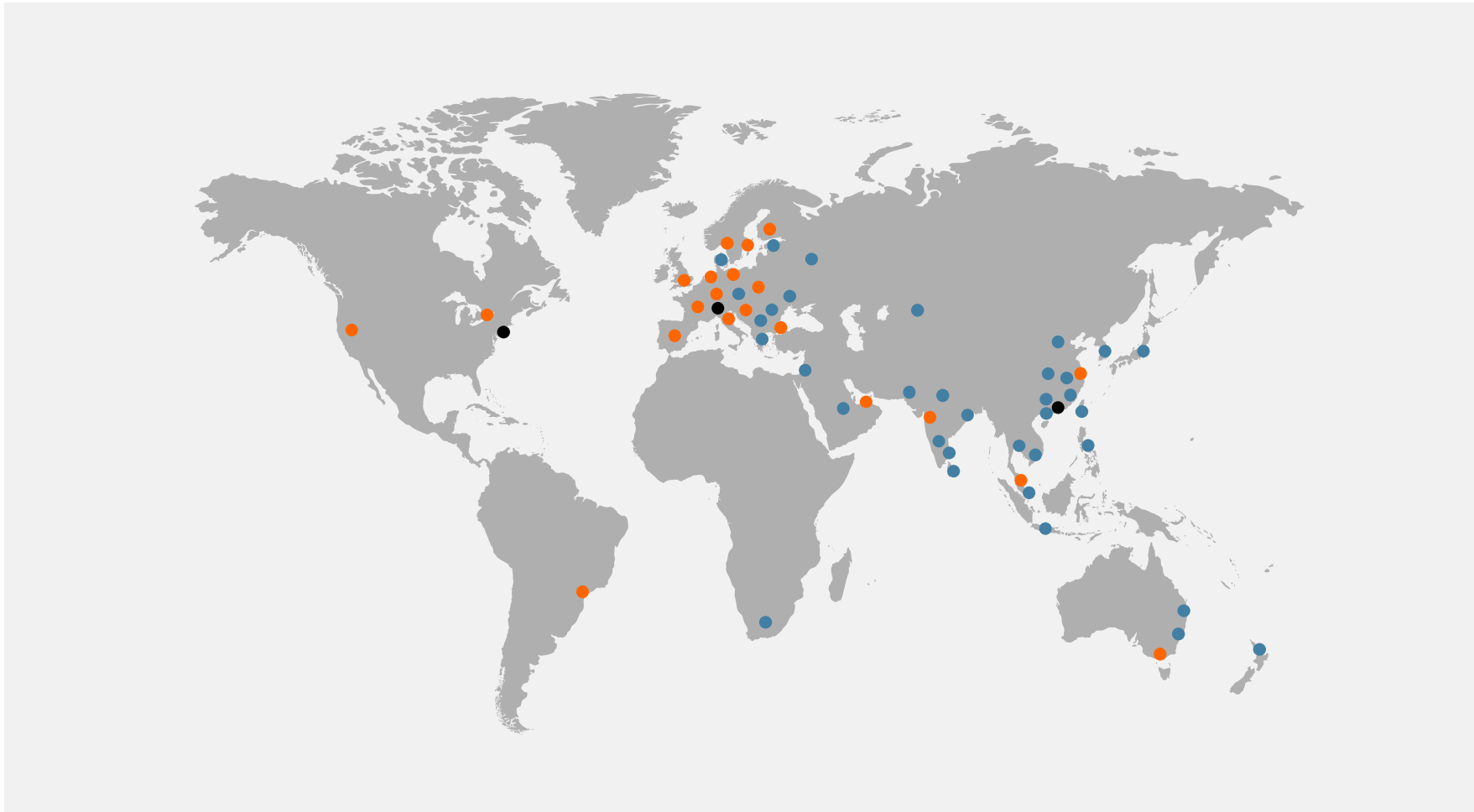


Executive Committee



Sites Around the Globe

Close to our customers. In more than 80 countries.



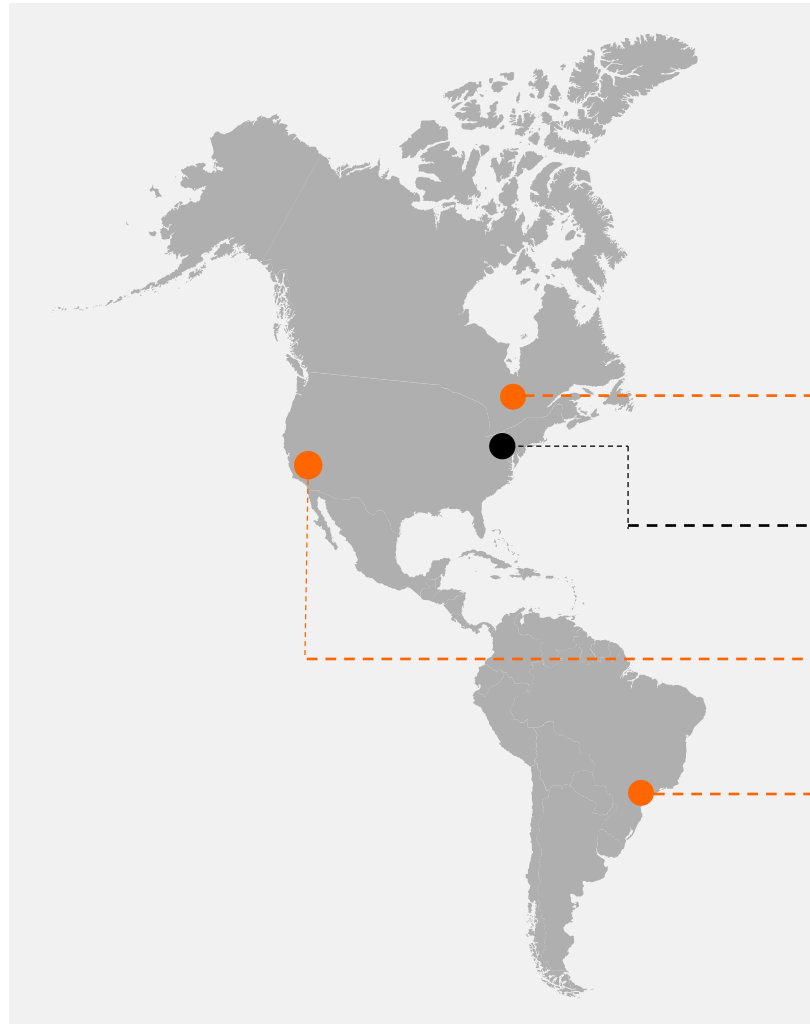
-
- Regional Headquarters
 - Subsidiaries
 - Representatives, Franchising Partners
-

Americas Locations

Over 400 Belimo people serving our customers



- Regional Headquarters
- Subsidiaries



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:**

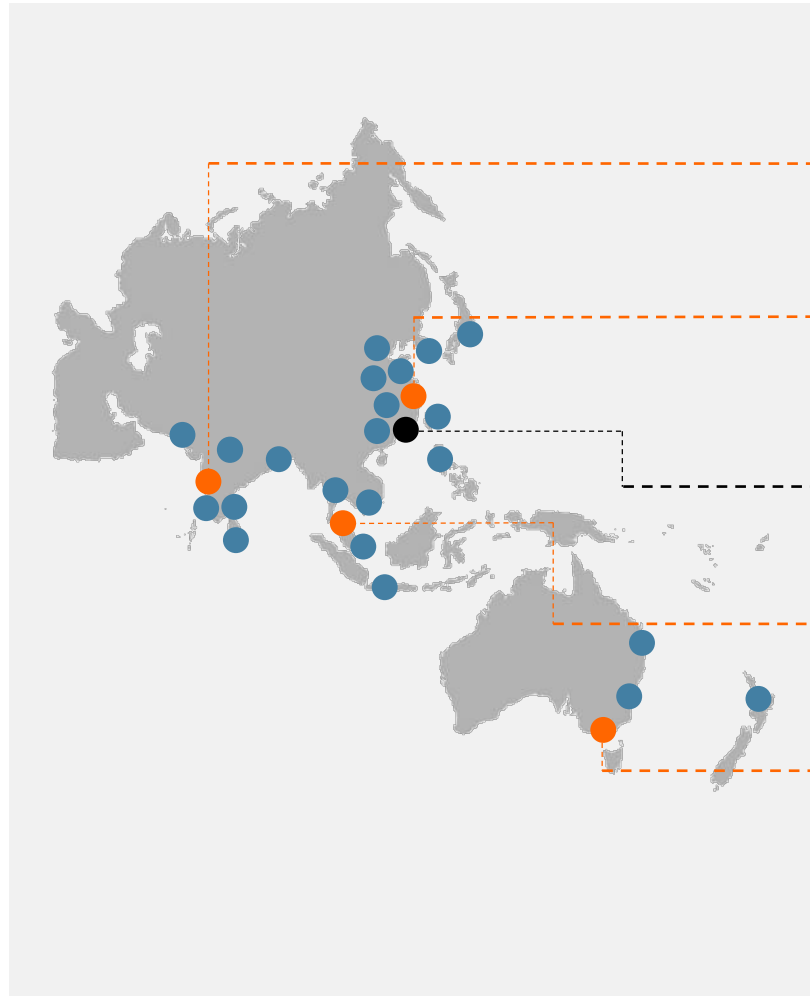
470

Asia Pacific Locations

Fast growing Belimo organization with 300 people



● Regional Headquarters ● Subsidiaries ● Representatives, Franchising Partners



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

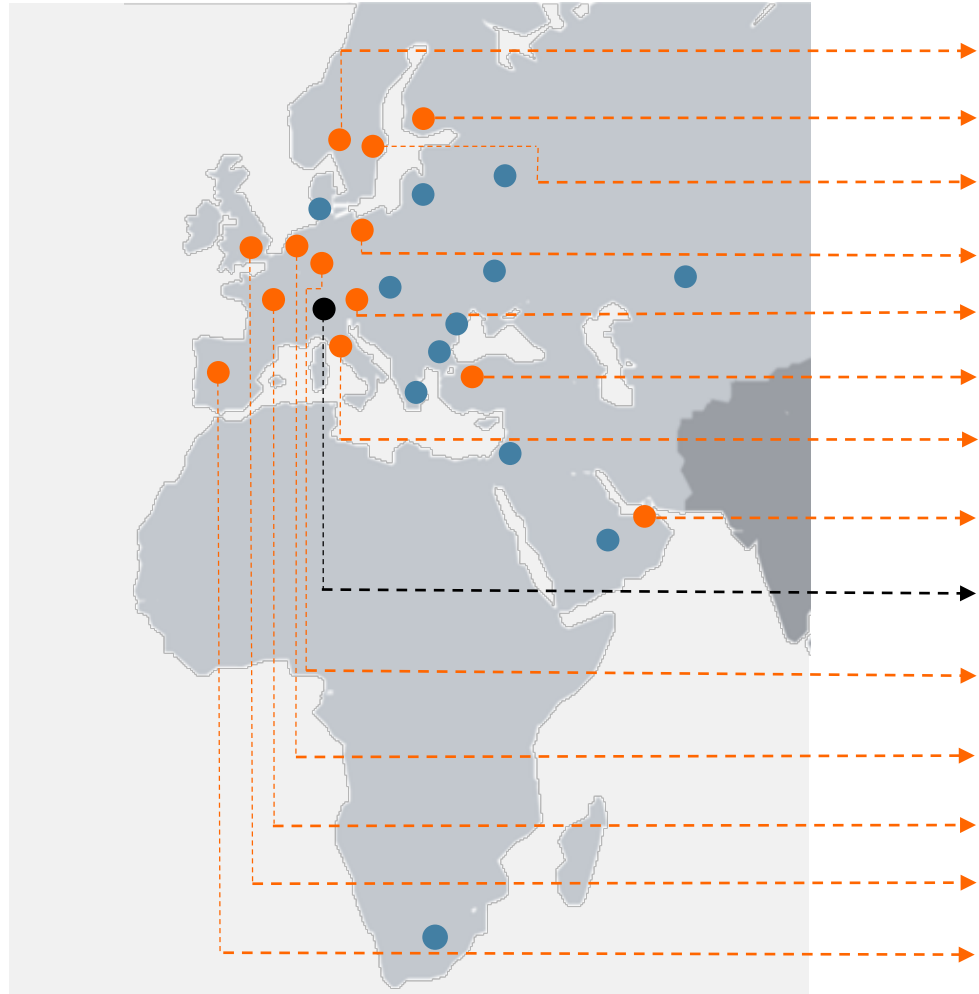


Total Asia Pacific Employees:

300

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

- Regional Headquarters
- Subsidiaries
- Representatives, Franchising Partners

	Employees: Representatives, Franchising Partners	120
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	Total Belimo Europe Employees:	1130
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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

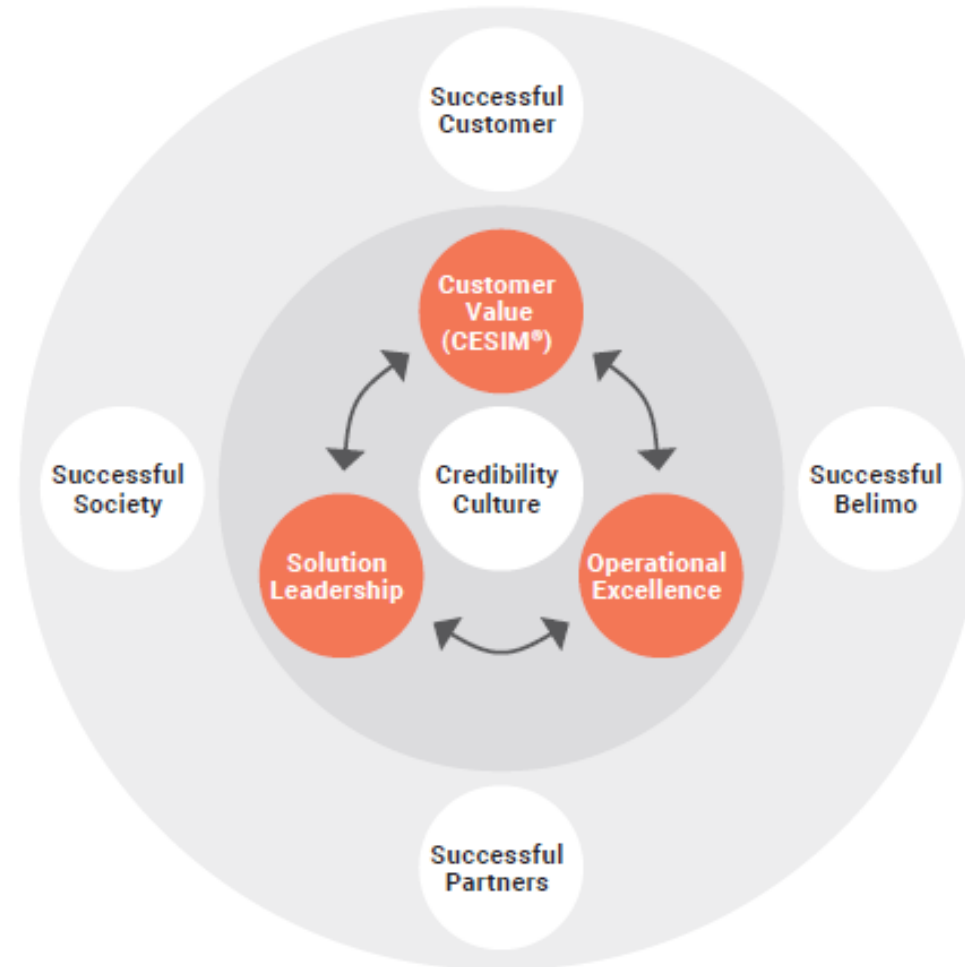


2019

Launch of room sensors

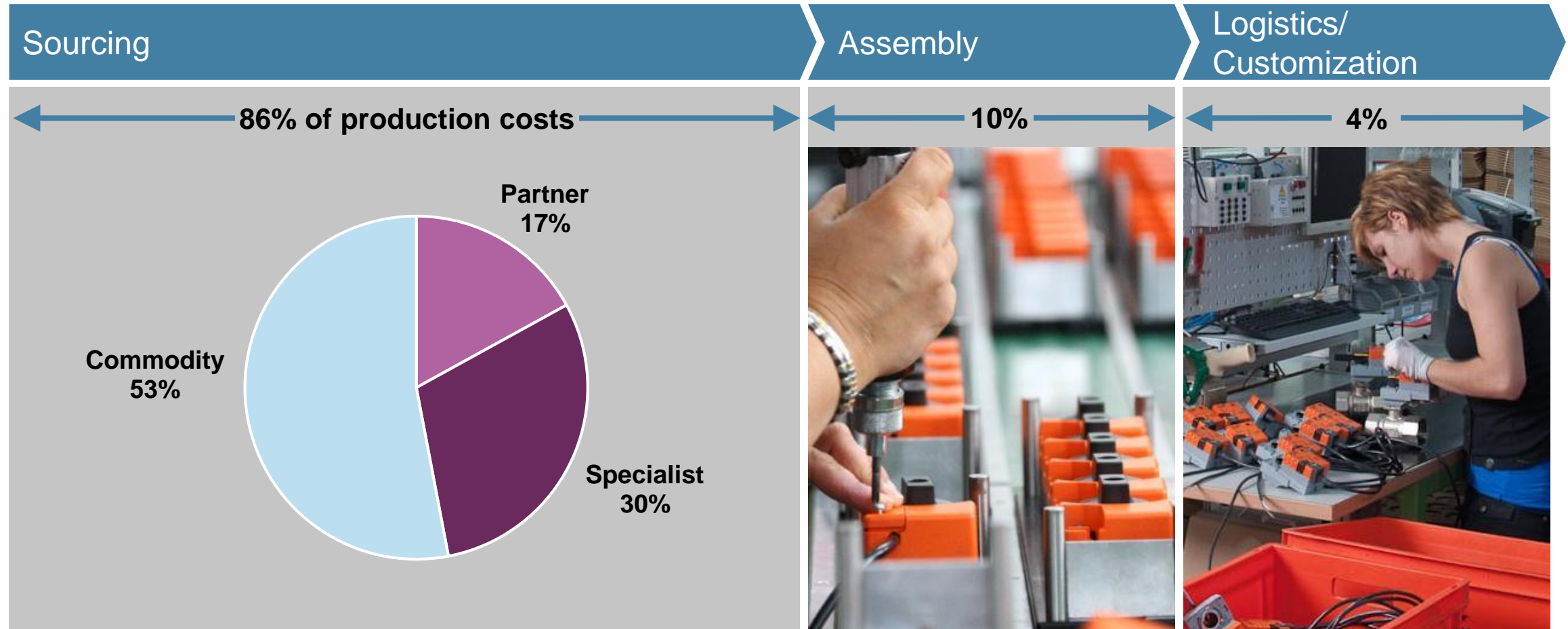
Belimo Value Creation Model

Successful customers ultimately lead to a successful Belimo



Operational Excellence

Focus on final assembly, testing & customization. Rely on partners.



Operational Excellence

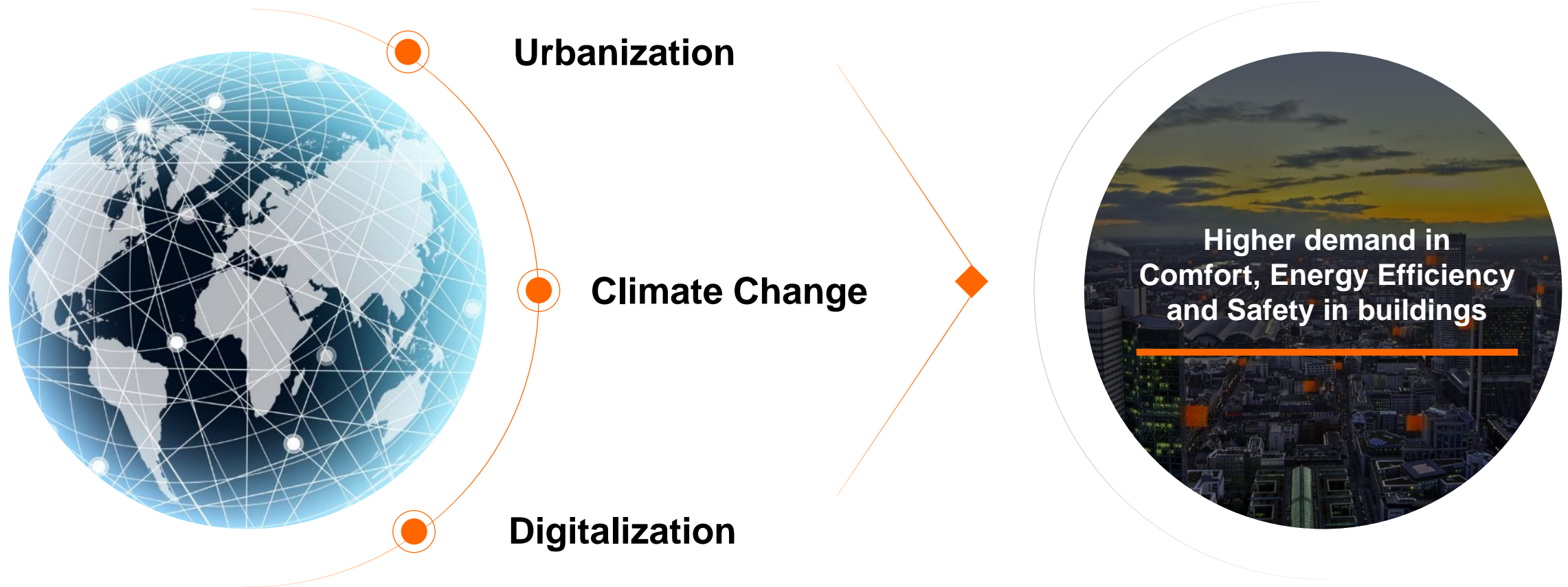
Our commitment to quality



- 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



Our Purpose

What we want to impact

COMFORT



Create more comfort and health for people in buildings.

C

ENERGY



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

E

SAFETY



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

S

INSTALLATION



Make installations easier and the commissioning faster.

I

MAINTENANCE



Assure long lifetimes and minimal maintenance efforts for HVAC controls equipment.

M

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



Application Examples

Fire & smoke protection

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.



Application Examples

Controlling room comfort

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

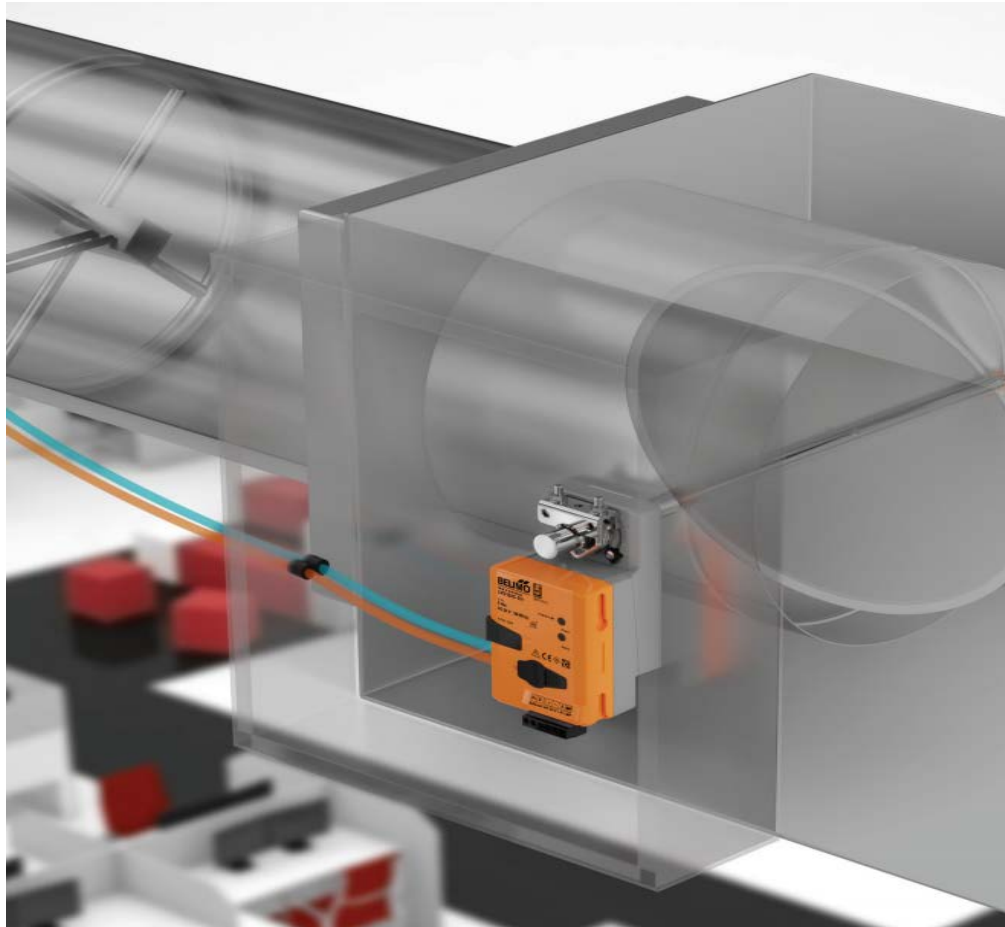


Belimo Energy Valve™

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.

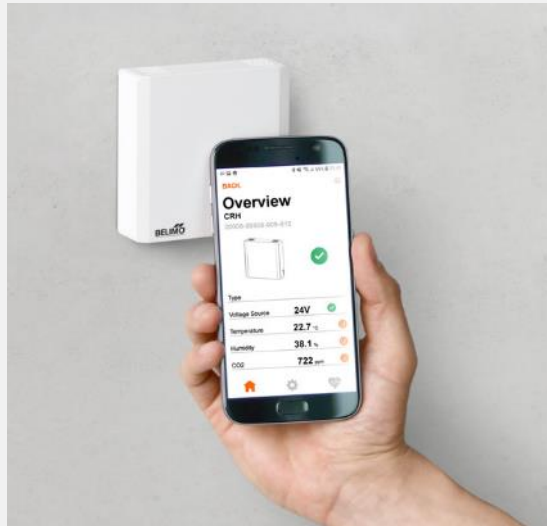
It provides commissioning support via the cloud and the Belimo Assistant App. ZoneEase™ reduces the project complexity and the commissioning time substantially and automatically documents all configuration-settings. The progress of a VAV-job gets fully transparent.

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

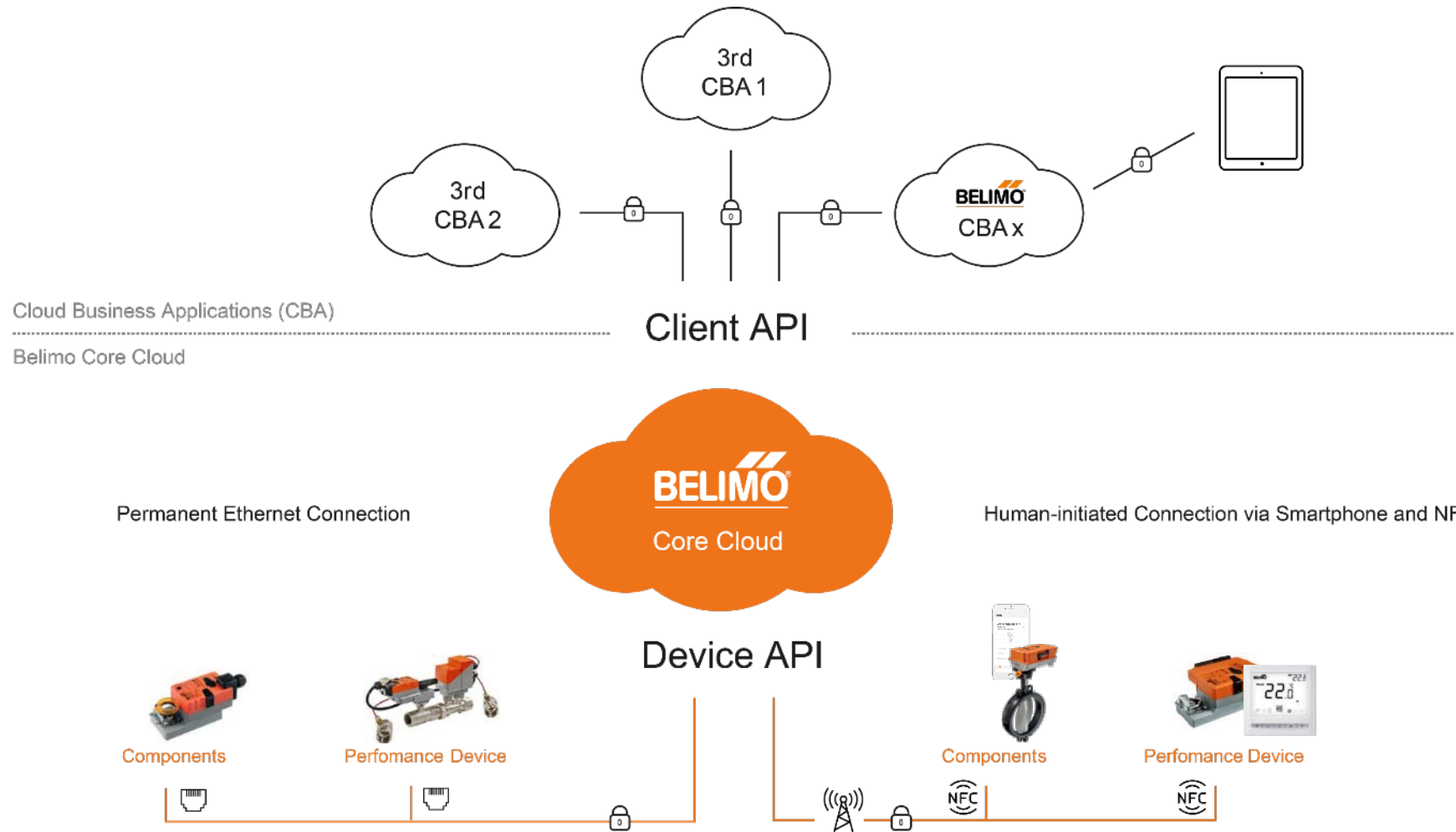
Flow Measurement that You Can Trust



- Accurate and reliable
- Patented glycol measurement and compensation
- Compact design
- Easy installation
- Accurate results without drift

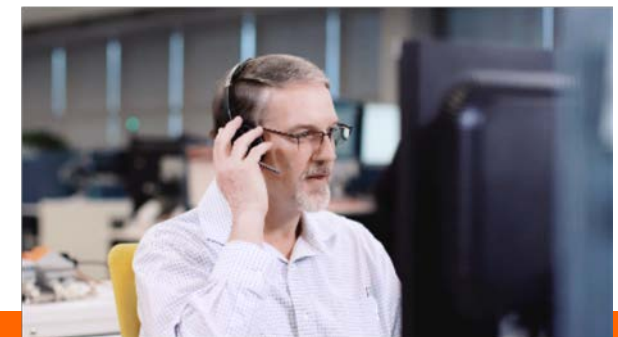
Solution Leadership

Belimo IoT-ready products and the Belimo eco-system



Belimo Added Values

More than just products



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 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



Belimo Movie Channel

More movies on belimo.corporate.tube



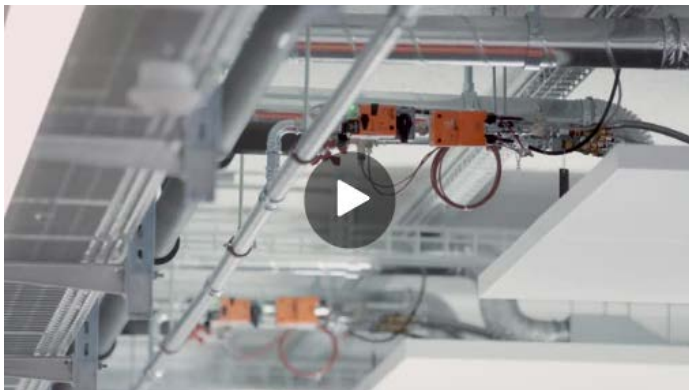
Company Movie



Belimo Energy Valve™ Case Study - Nashville



Creating Customer Value with CESIM



Our Commitment to Quality



Ultrasonic Flow Sensor Technology



The 100 Millionth Belimo Actuator.
Thank you!



Comfort

Installation

Maintenance

Small Devices,
Big Impact.

Energy Efficiency

Safety



BELIMO®
