

GF Piping Systems

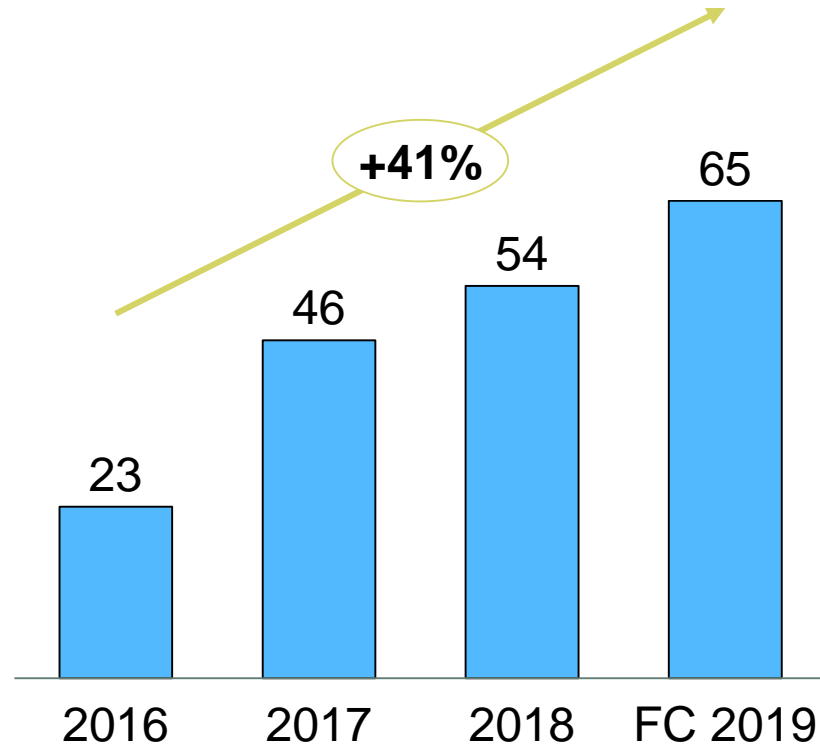
Connected innovations making flow sustainable

Joost Geginat, President GF Piping Systems
Capital Market Day 2019

Tech-Day 2016: Delivering on our promises



Cooling Sales 2016 to 2019 (MCHF)



GF Strategy
20+
20+

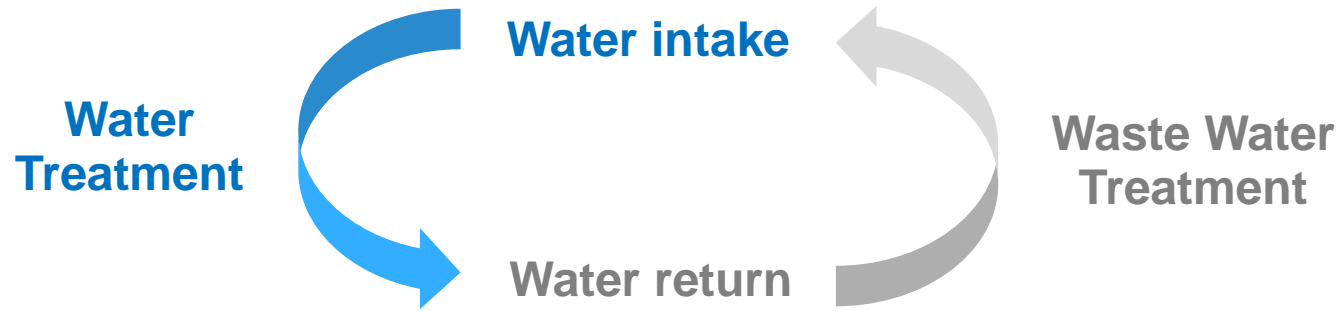
30%
Energy
savings

50%
Faster
installation

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Key Market Trends

Megatrends benefiting our business



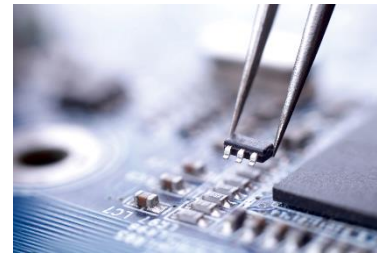
Utilities

Leak-free and safe delivery of water and gas outside buildings



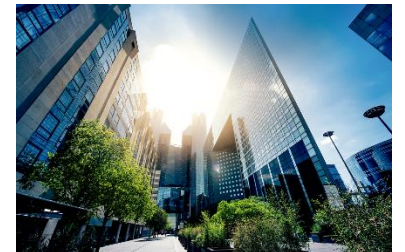
Industry

Energy-efficient process water solutions for various industries

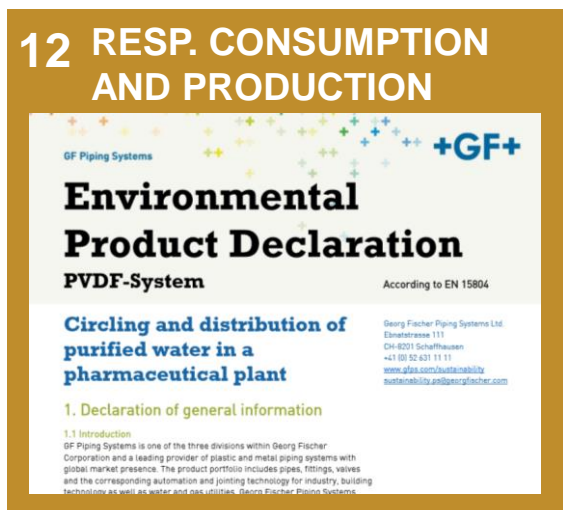


Building Technology

Hygienic water for private homes and commercial buildings



Our solutions support UN Sustainable Development Goals (SDG)



The important trends affecting our customers needs



Digitalization / Industry 4.0



Environmental regulations



Skilled labor shortage



Peace of mind



Increased efficiency

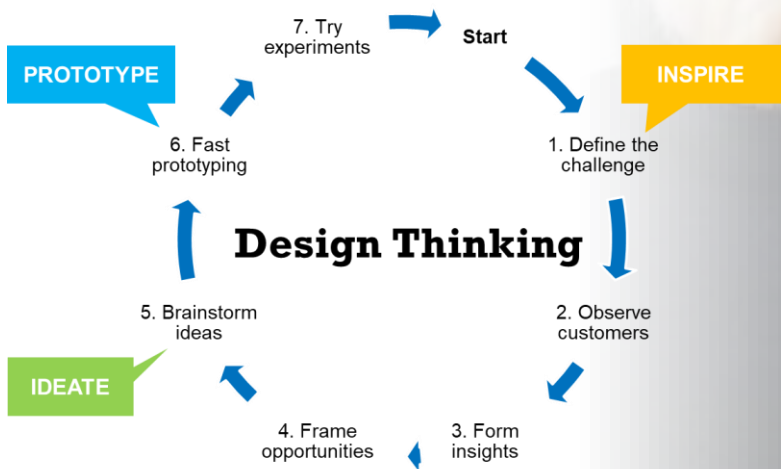


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How we are addressing these market trends

We build on those needs

1. Create differentiation
2. Solve customer pains
3. Improve quality
4. Reduce cost
5. Attract Talent



Digital solutions as differentiators



Higher Value Solutions...

... addressing our clients most pressing needs

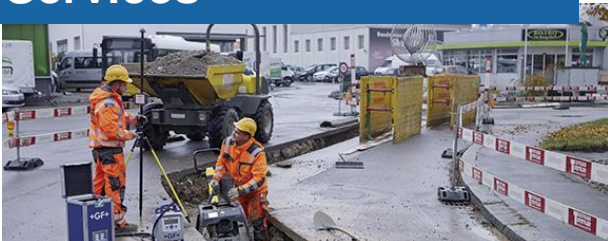
Digital complements



High value core offering



Services



Environmental regulations /
Peace of mind

Hycleen AS



Skilled labor shortage

ProSite



Increased efficiency

Track & Trace



Digitalization /
Industry 4.0

Process Automation



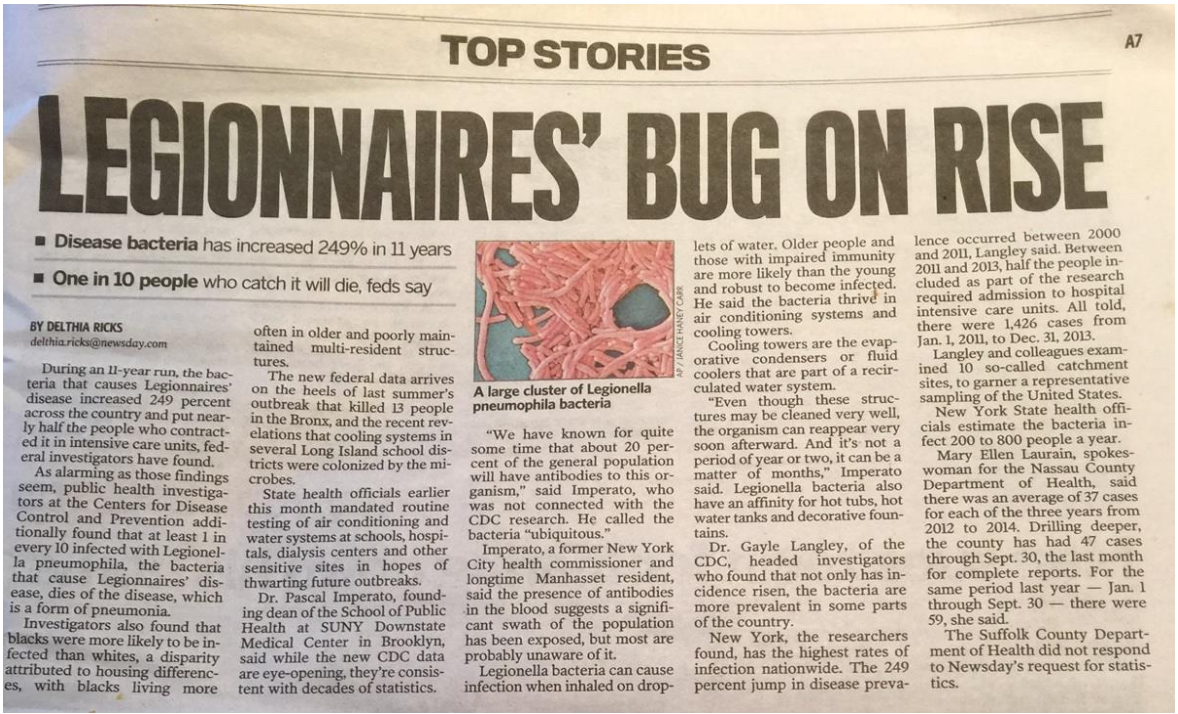
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Hycleen Automation Systems

Hyclean Automation System: A Step Change in Water Hygiene




Legionella outbreaks on the rise




Stricter drinking water regulations

NEW EU RULES ON DRINKING WATER




Water management programs are now an industry standard for large buildings in the United States

CDC has a free toolkit with practical guidance on how to tailor a water management program for your building and needs.



**U.S. Department of Health and Human Services
Centers for Disease Control and Prevention**

#DrinkingWaterEU



Customer-centric innovation: Hyclean Automation System

+GF+

- Simple system set up
- Simple to install and commission
- Simple to operate
- Prevention of biofilm formation and Legionella infestation
- Energy consumption savings

No.	Name	Value
1	Legiotherm	
2	Legiotherm	
3	Legiotherm	
4	Legiotherm	50°C
5	Legiotherm	54°C
6	Legiotherm	57°C
7	Legiotherm	57°C
	Legiotherm	58°C

GF Strategy 20+20

15% Energy savings

2x Faster installation



reddot award 2019
honourable mention

Hyclean Automation System taps into attractive markets



Hospitals & Nursing

More than 100'000 hospitals and nursing homes globally¹

+5% p.a



Global health care spending increases from 7tn USD in 2015 to 10tn USD in 2022²



Hotels

~200'000 large scale hotels offering 17.5 m² guest rooms around the globe³

+11% p.a



Global hotel investment increased from 30bn USD in 2011 to 67bn USD in 2019⁴



Marine

386 ocean cruise ships on sea⁵, ~200 superyachts sold in 2018⁶

+5% p.a



68bn USD investment in 114 ocean cruise ships until 2023⁵

Showcase GF Piping Systems



Jens Frisenborg

Head of Business Unit Industry & Utility



Daniel Friedrich

Head of BU Building Technologies, Germany



Sandra Schiller

Head of Global Product Management, Industry



Intelligent solutions for the safe supply and the automation of drinking water installations



Innovations enabling the monitoring, control and maintenance of valves in industrial systems

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Thank you!