



uponor

Uponor Capital Markets Day

Hassfurt, Germany
2 June 2016

CMD
2016
Capital Markets Day

Uponor Capital Markets Day

2 June 2016



8.30 Opening
Uponor strategy update
Jyri Luomakoski, President and CEO, Uponor Corporation

9.00 Building Solutions – Europe: Rethinking for profitable growth in a low growth environment
Jan Peter Tewes, President, Building Solutions – Europe

9.45 Uponor Infra: Building a new focus around core competencies
Sebastian Bondestam, President, Uponor Infra

10.30 Break & Refreshments

10.45 Building Solutions – North America: Steady the course, full steam ahead
Bill Gray, President, Building Solutions – North America

11.30 – 12.15 Lunch

12.15 Site visit and presentation of the Distribution Centre, insulated pipe as well as fittings production

14.00 Group Technology: Reaching beyond the box to respond to global megatrends
Fernando Roses, EVP, Group Technology and Corporate Development

14.30 Q&A

Closing
Jyri Luomakoski, President and CEO, Uponor Corporation

15.00 – ca 18.00 Bus transportation to Frankfurt Airport, Terminal 2 and 1



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Uponor strategy update

Jyri Luomakoski
President and CEO
2 June 2016

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Megatrends create opportunities to improve our living environments

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Megatrends affect societies fundamentally and over a long period of time



Climate change and scarcity of resources



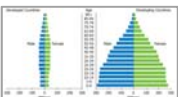
Urbanisation



Digital transformation



Shift of economic power towards emerging markets



Demographic split to aging and growing populations

...raising new requirements and opportunities to improve living environments

- ➔ Sustainability and energy efficiency
- ➔ Quality and management of water
- ➔ Plastic taking share from metal
- ➔ Pre-fabrication
- ➔ Building Information Modelling (BIM)
- ➔ Shift from manufacturing to services
- ➔ Expanding middle class
- ➔ Increasing need for comfort

Uponor solutions improve living environments and enhance people's life

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Uponor is in the business of providing solutions for water management and indoor climate



Comfort

- Invisible and silent comfort in living and working environments
- Enhanced architectural freedom with seamless integration into buildings and infrastructure



Health

- Clean water for drinking, cooking and bathing
- Avoiding draught, moist walls, circulation of dust, pollution



Efficiency

- Pre-fabrication to speed up construction process
- Ease and speed of design and installation



Sustainability

- Driving down our environmental impact
- Reduce water and energy consumption
- Solutions designed to last for a lifetime



Safety

- Reliable during installation and operation

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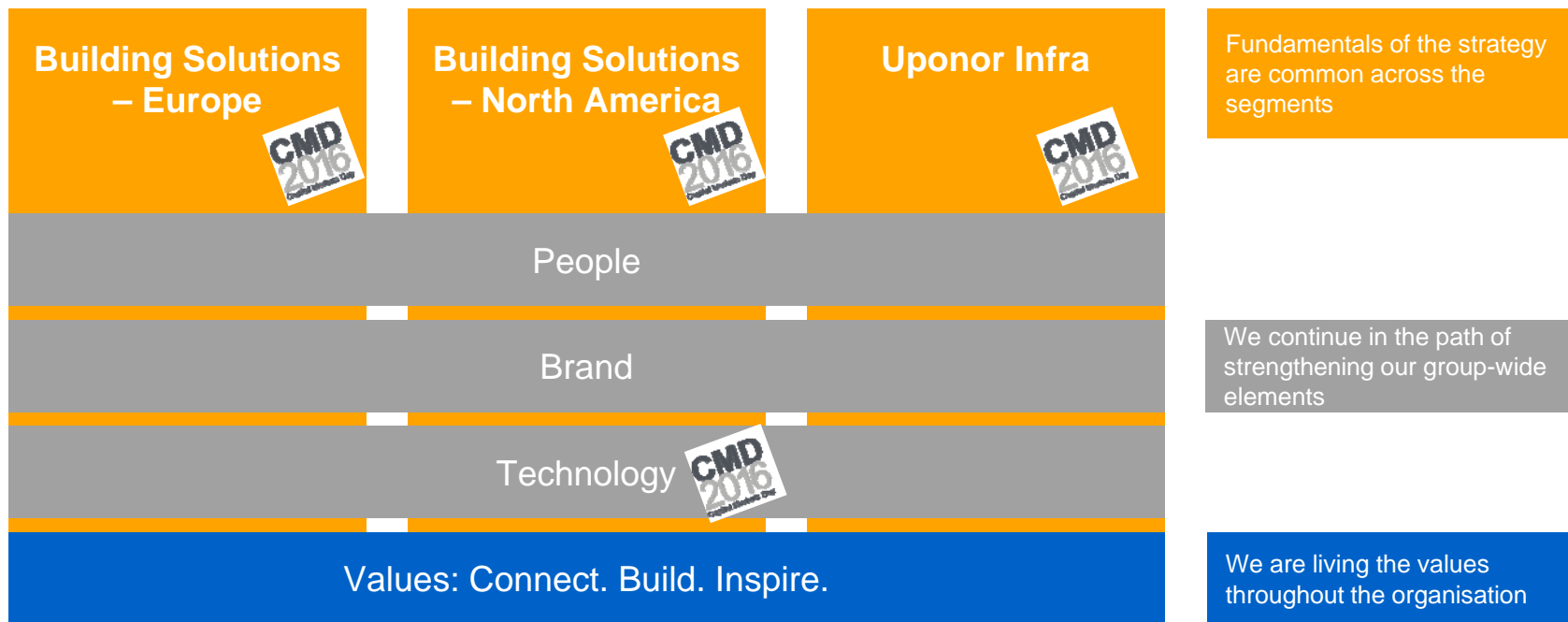
Uponor's strategy to generate sustainable growth in the shorter and longer term

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Segments execute Uponor strategy

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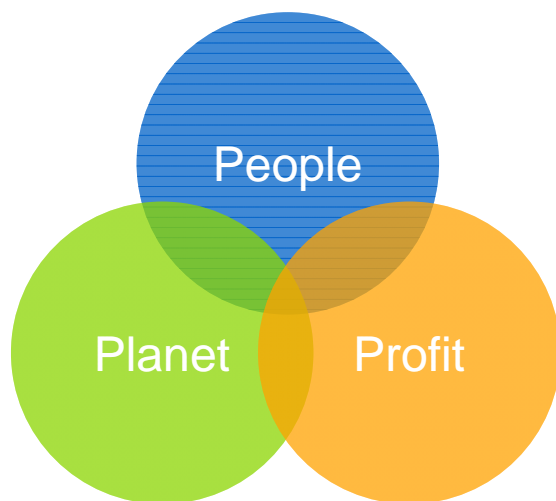
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= Covered today

Uponor is committed to sustainability

Offering designed for CHESS, KPIs to follow-up

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Focus area	KPI	Target in 2020
Carbon footprint	CO ₂ emissions	-20% from 2015
Utilisation of green/ renewable energy	Share of green electricity	100%

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People strategy builds an environment for growth and achievement

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Foster great leadership

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Strengthen our strategic competences

3

Equip employees to take initiative and have impact



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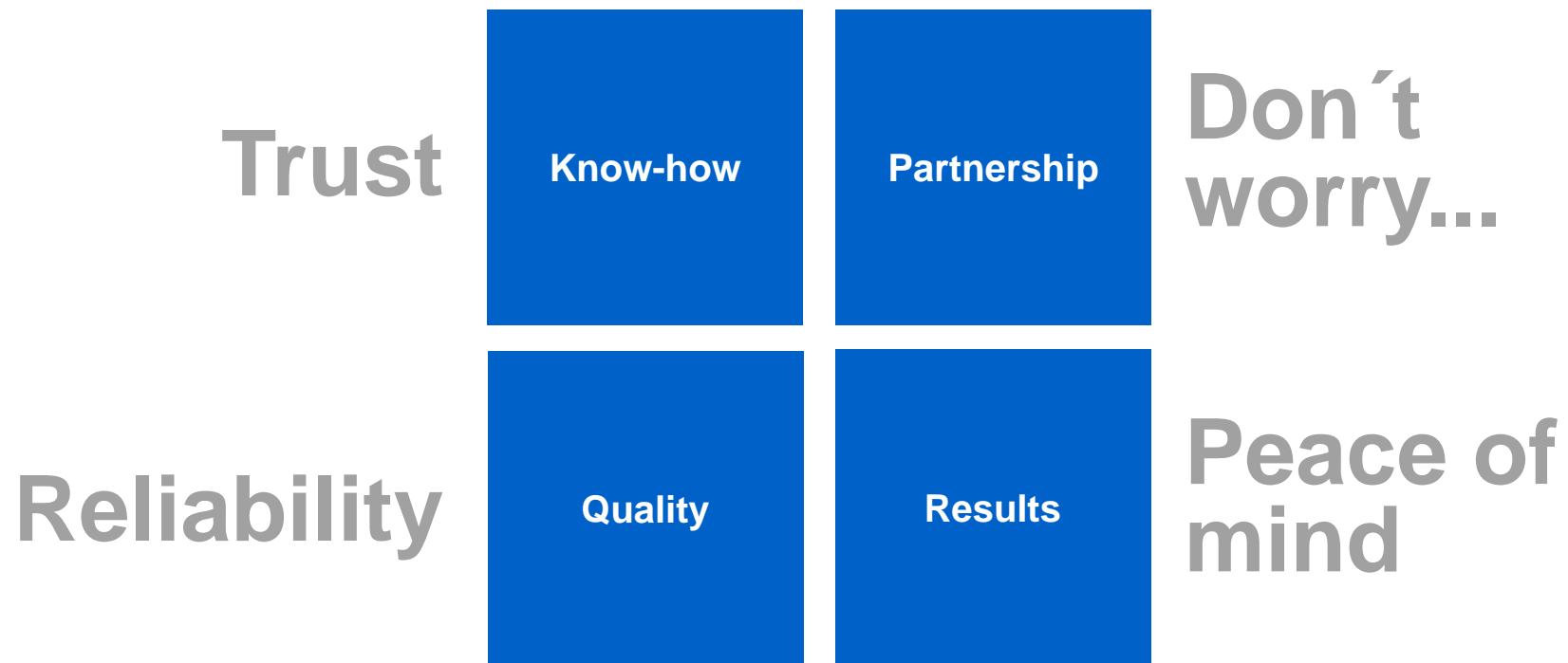
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The Uponor brand builds confidence

Rational proof points turned into emotional value

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Uponor values guide people throughout
our organisation

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Connect.
Build.
Inspire.



Uponor strategy update

Q&A

Jyri Luomakoski
President and CEO



A nighttime photograph of the Frankfurt am Main skyline, featuring illuminated skyscrapers and a bridge over the Main River.

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Rethinking for profitable growth in a low growth environment

Jan Peter Tewes
President, Uponor Building Solutions – Europe
2 June 2016

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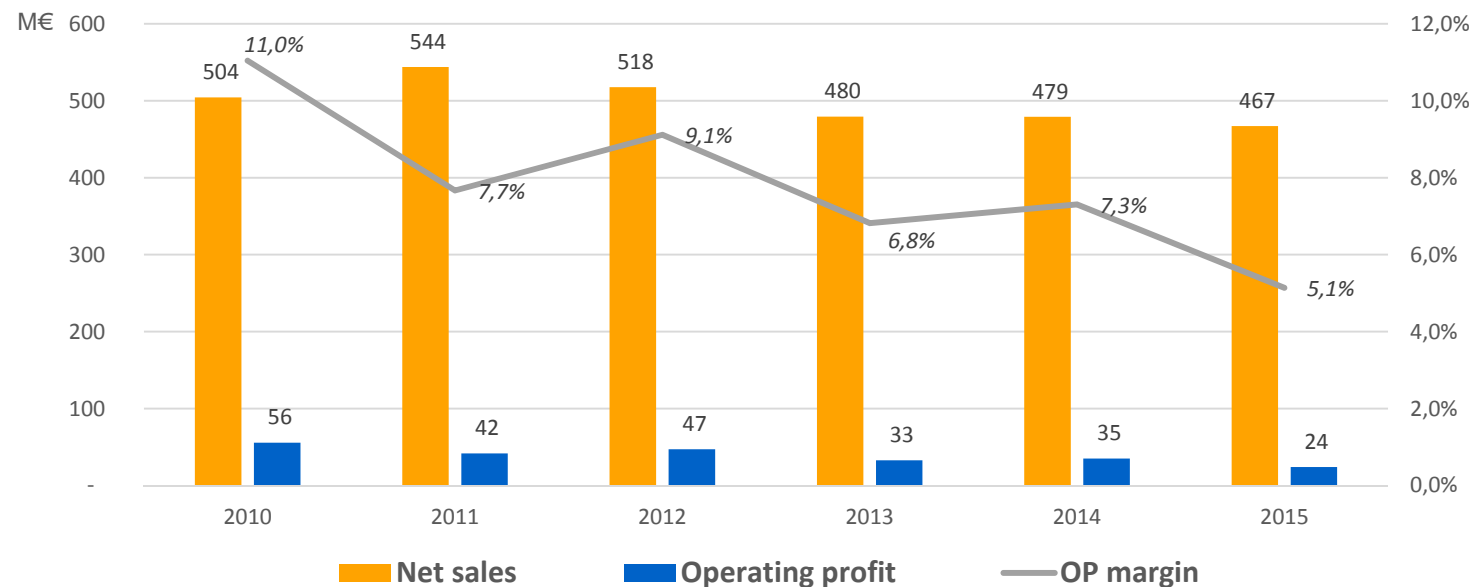
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Objective 2016-18: Turnaround of the largest segment in Uponor

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Setting the base for future investment into
profitable growth



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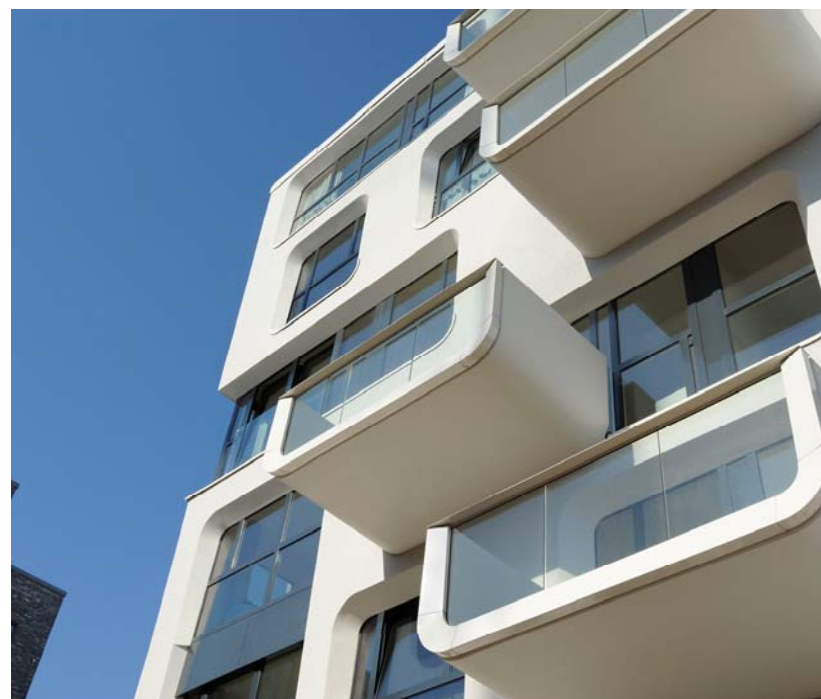
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Attractive European market

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- **The housing market is solid** across major European markets
- **Immigration** and **urbanisation** are fuelling demand for more housing
- **Legislation driving premium** solutions across core product segments
- Customer base **consolidating across the EU** – opportunity to establish Uponor as key supplier to wholesalers as well as installers/planners/investors

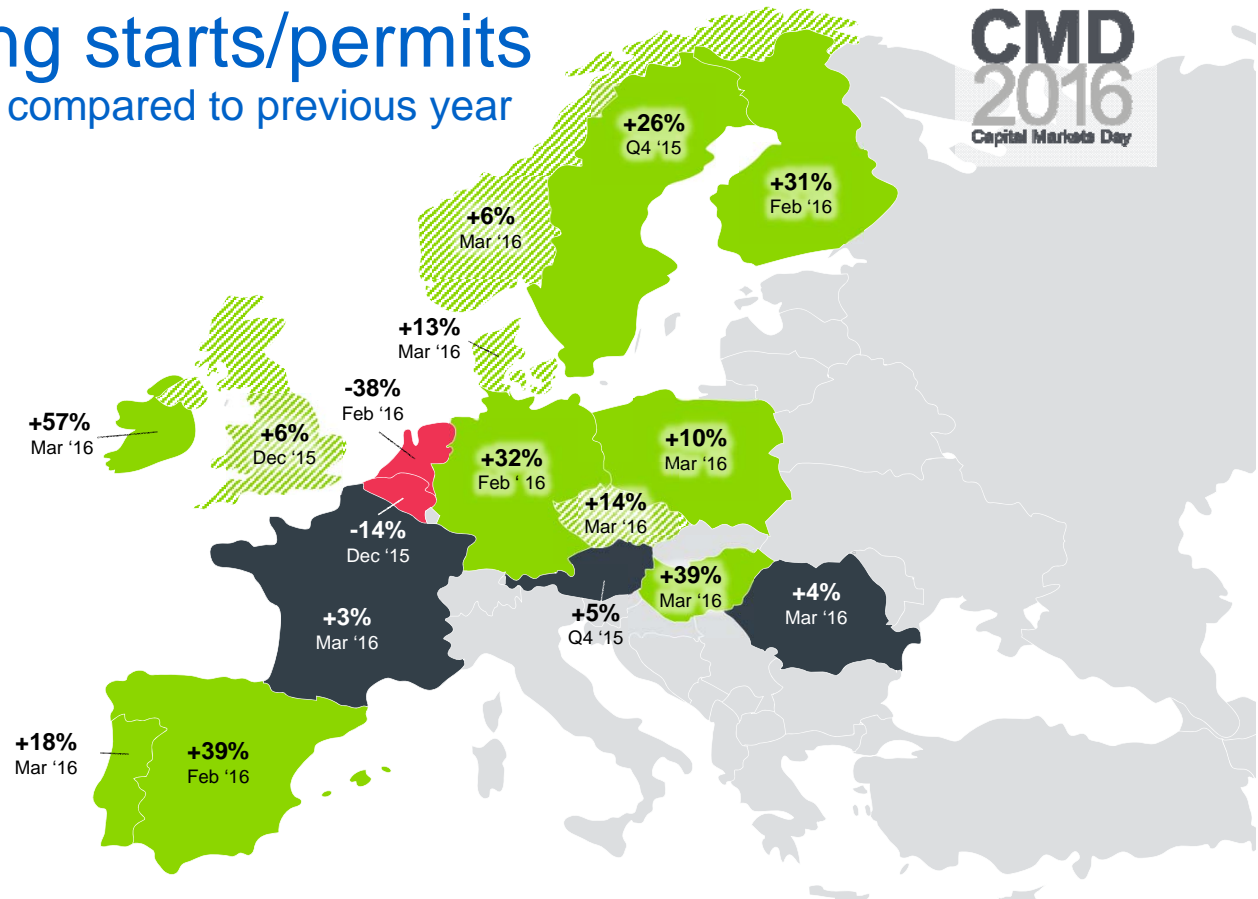
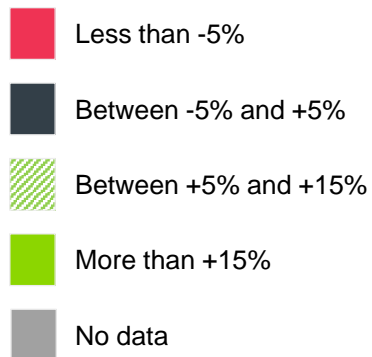


European housing starts/permits

Year-to-date percent change compared to previous year

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Growth

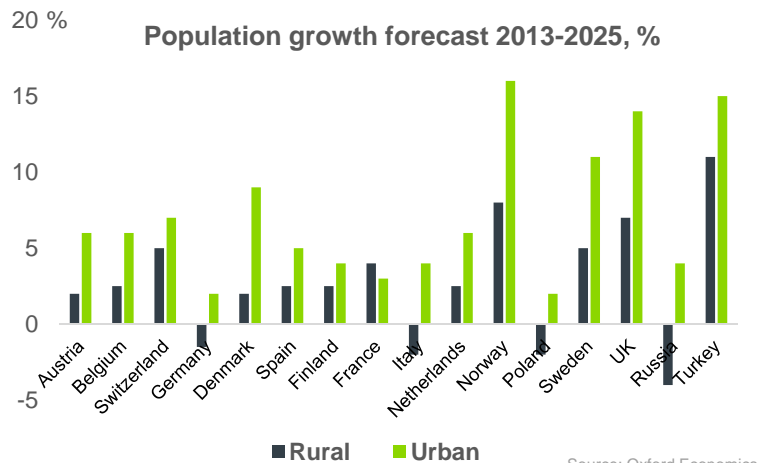


Source: National statistics agencies and Reuters

Four European trends & Uponor's response

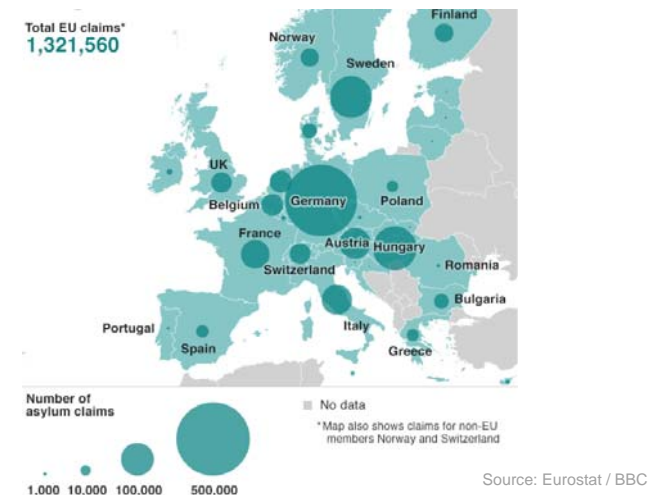
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1 Urbanisation



Shift sales focus towards key cities, e.g. London, Stockholm, Helsinki, Berlin...

2 Immigration



Targeted sales initiatives of Uponor Ecoflex (local heat distribution) pipes and decentral fresh water stations

Four European trends & Uponor's response

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3 Increasing importance of regulations



Example: European drinking water directive – Uponor tailor-made offerings based on housing type, e.g. residential, healthcare, hotels

4 Customer consolidation


SAINT-GOBAIN




onninen


ahlsell


VGH
International

Ongoing wholesale consolidating driving rationalisation to few key European suppliers – opportunity for Uponor to emerge as a strategic pan-European supplier

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Transformation programme

Started in November 2015



Rationale

- Longer-term gradual decline of net sales and operating profit – fixed costs too high
- Mixed root causes urging us to review functions and market set-up
- Low agility as a result of complex structures

Key performance indicators

- €20m savings mainly by 2017 and onwards
- Reduction of a maximum of 300 full-time jobs across Europe – with a net impact of 250 jobs

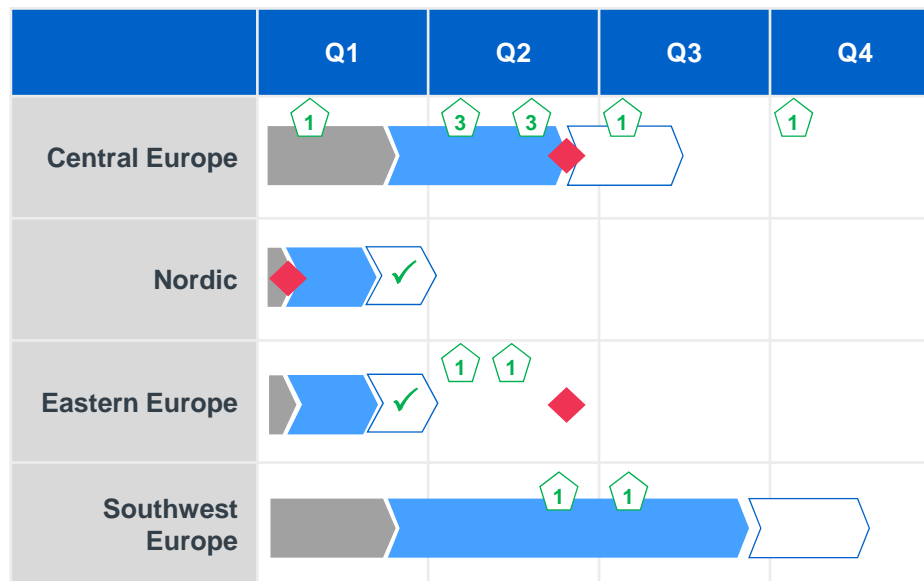
Operations

- Optimisation of warehouse and factory footprint supporting European sales distribution network

Marketing & Sales

- Introduce a hub-based operational model for central functions with fewer layers in the organisation; move to three regional hubs: Vantaa (FI), Frankfurt (DE), Warsaw (PL)
- The “4C Strategy” to dissect and to drive growth opportunities

Status of the head count reduction



- Programme on track with 116 FTEs dismissed, out of a net target of 250
- High complexity as a result of differing legislation locally
- European hubs to be established in Helsinki, Frankfurt and Warsaw
- New senior leadership in key roles across operations, sales, marketing and finance

Examples of the transformation programme

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Ecoflex Germany: New 3-shift agreement



Ecoflex production and especially the important “cut to measure” service now part of 3-shift production

Ecoflex Nordics: Relocation to Sweden



Migration from Nastola (Finland) to Virsbo (Sweden) finished in order to make space in the Nastola plant for Uponor Infra

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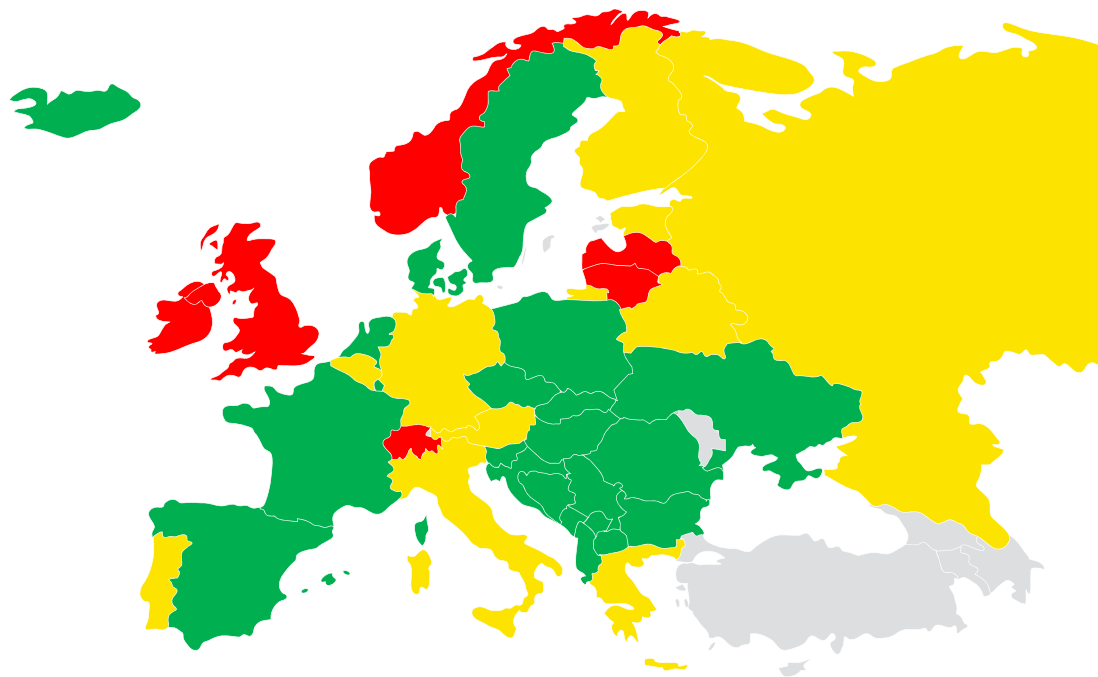
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Recent historic performance differs by market

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**Performance =
Mid-term development of**

- Market share
- Net sales
- Operating profit

Uponor's strategy to generate sustainable growth in the shorter and longer term

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Defending, expanding and generating new opportunities

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- **Dissecting growth opportunities:**
across Countries, product Categories, Customers and Channels – target a growth above GDP and a double-digit OP margin
- **Acquisitions on track:**
Zent-Frenger (2011), KaMo/Delta (2015)
- Long term objective:
increase **share-of-wallet by flat/building**



The “4C Strategy” – dissecting growth

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1	Countries & Cities	<ul style="list-style-type: none">• Key objective to grow market share: faster than competition in solid markets (e.g. Spain, Sweden), and declining slower in difficult markets (e.g. Finland, Russia)• Re-allocating resources to urban building hubs: Helsinki, Stockholm, Berlin etc.
2	Customer	<ul style="list-style-type: none">• Increase share-of-wallet amongst top customer groups: wholesalers• Modern key account management across Building Solutions - Europe
3	Category	<ul style="list-style-type: none">• Supporting Group strategy, and driving plumbing installation growth• Premium platforms to allow a price and margin premium: e.g. drinking water safety (hygiene)• Strongest ever product roadmap for the coming 24 months developed together with Group Technology
4	Channel	<ul style="list-style-type: none">• Growth in professional project segments (“build professional”) through prefabricated installation solutions, one CRM system, segment based key account management• Growth in distribution business (“install professional”), e.g. the semi-pro channel in Benelux and the Nordics

Acquisitions growing above company and market rate

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Zent-Frenger

- TABS (thermally activated building structures)
- Complex and large-volume underfloor heating
- GEOZENT heat pumps



Delta

- Fresh water stations (Germany)
- Monitoring services



CEFO

- Renovation cassettes for Finland and Sweden



KaMo / R2i

- Pre-fabricated ready to install (R2i) stations from KaMo (Germany)



Pre-fabricated building solutions – a Finnish example

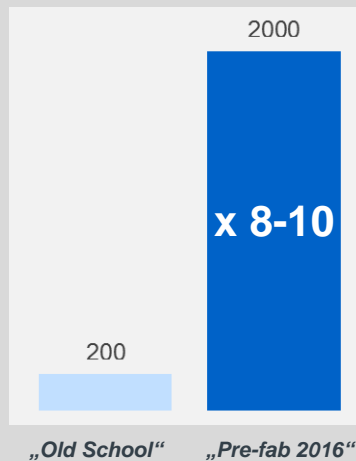
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Uponor „Old School“



Uponor used to "just" renovate pipe and fittings – average value per flat ~ €200

Average revenue
potential per flat



Uponor Finland Pre-fab 2016



Pre-fabricated design assembled in factory to increase on-site efficiency

- Less time and money for on-site installation
- Deeper integration with key stakeholders

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Strong macro drivers for growth

- Positive environment through urbanisation, immigration and low interest rates
- Segment-specific factors to be used to drive growth: regulation, consolidation, pre-fabrication

Transformation to “reset” the segment

- €20m in savings mainly by 2017 and onwards
- Reduction of 300 full-time jobs – net impact of 250 jobs
- Adjusted operations footprint

The “4-C Strategy” to dissect growth

Market share growth within each sector

- Countries/Cities
- Channels
- Categories
- Customers

Encouraging results after Q1/2016

- Q1/2016 net sales growing +9% (2.1% organic)
- Q1/2016 operating profit +22.9% (excluding NRIs from the transformation programme)



Rethinking for profitable growth in a low growth environment

Q&A

Jan Peter Tewes
President, Uponor Building Solutions – Europe





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Uponor Infra – Building a new focus around core competencies

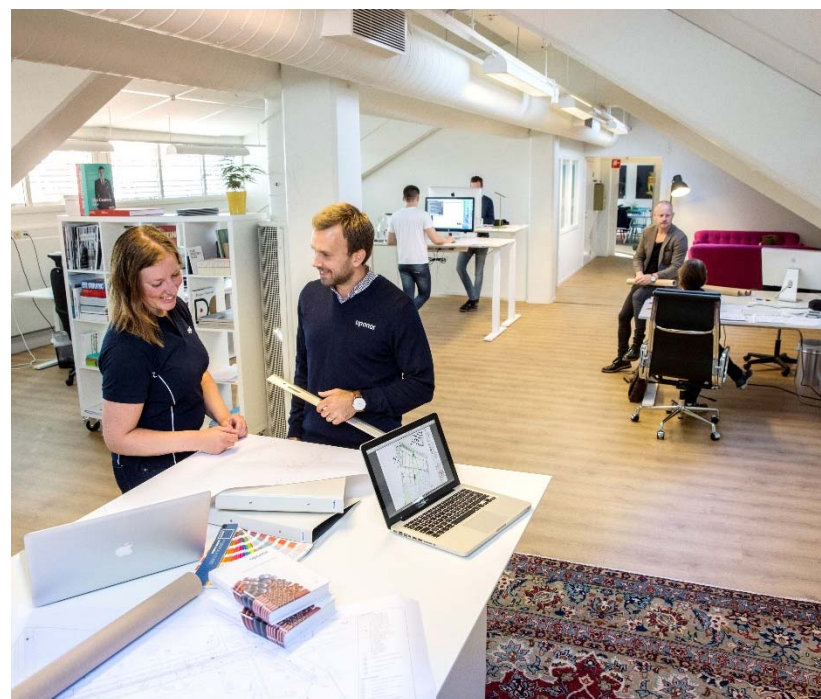
Sebastian Bondestam
President, Uponor Infra
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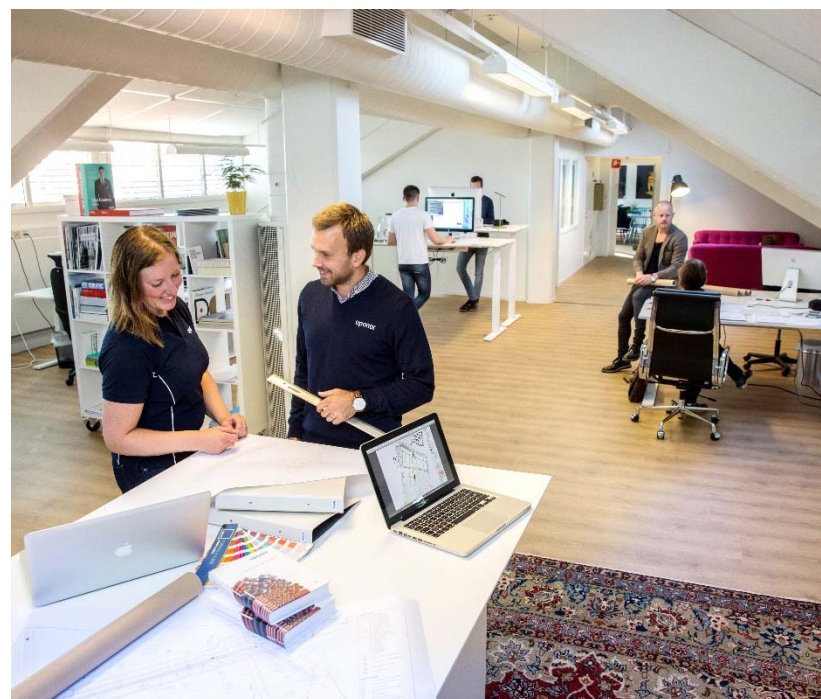
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The birth of Uponor Infra – created 1 July 2013

- Uponor 55.3% and KWH Group 44.7%
- Consolidated into Uponor's financial statements

Logic of the merger:

- Key markets are not growing and face overcapacity
- Consolidation cost savings of €10M
- Wider product portfolio
- Stronger market presence

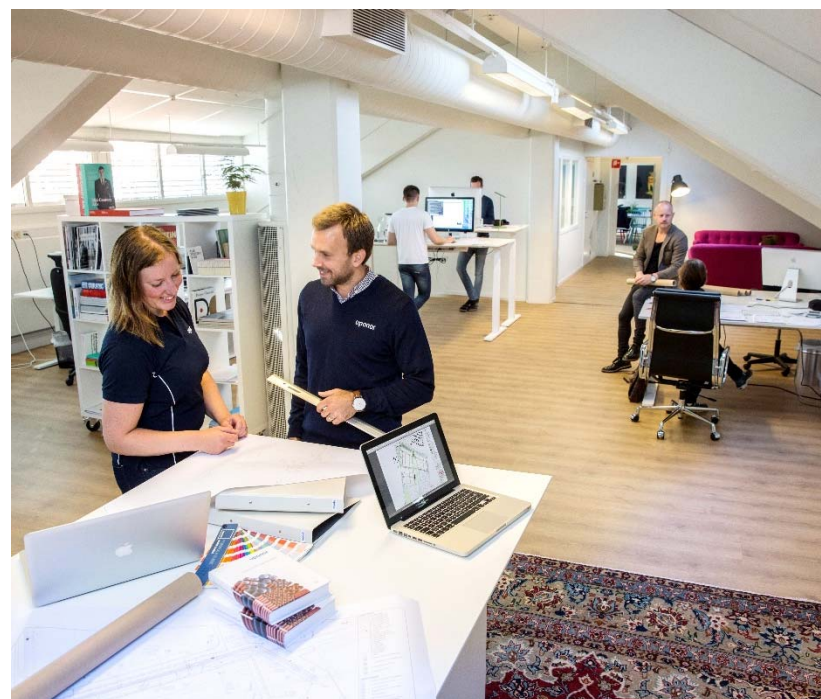
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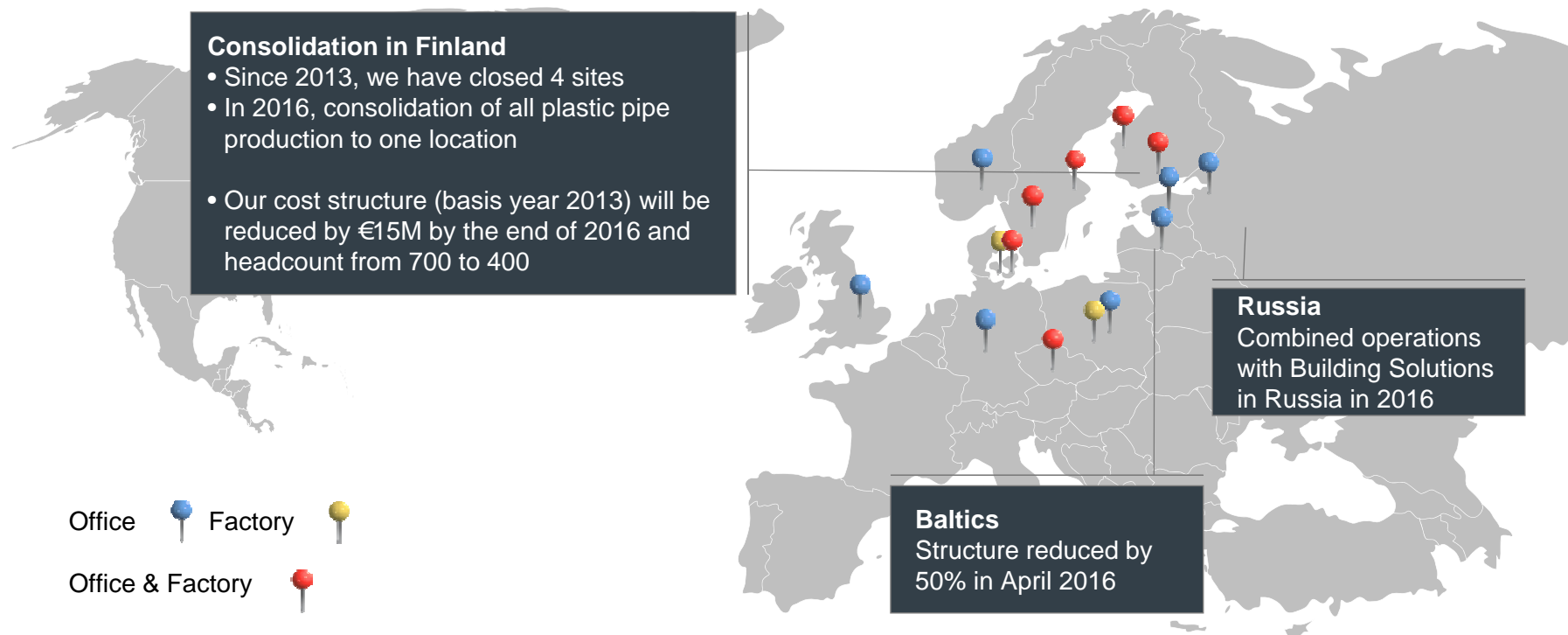
2015: Important milestones



- Divestment of non-core assets
 - Wiik & Hoeglund in Thailand, net sales €20M
 - Extron Engineering in Finland, net sales €5M
 - Omega-Liner® sales to renovation company Per Aarsleff, net sales €2M
- Due to very challenging market situation, further savings of €5+5M on top of the original business case implemented or under implementation
- Change of management in
 - Finland 2014
 - Norway and Canada in 2015

Transformation programme update

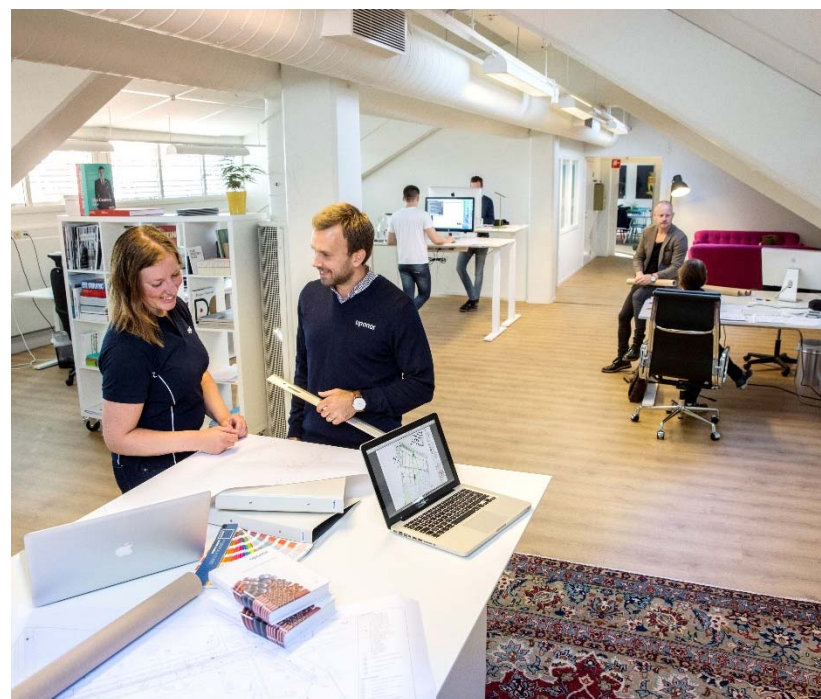
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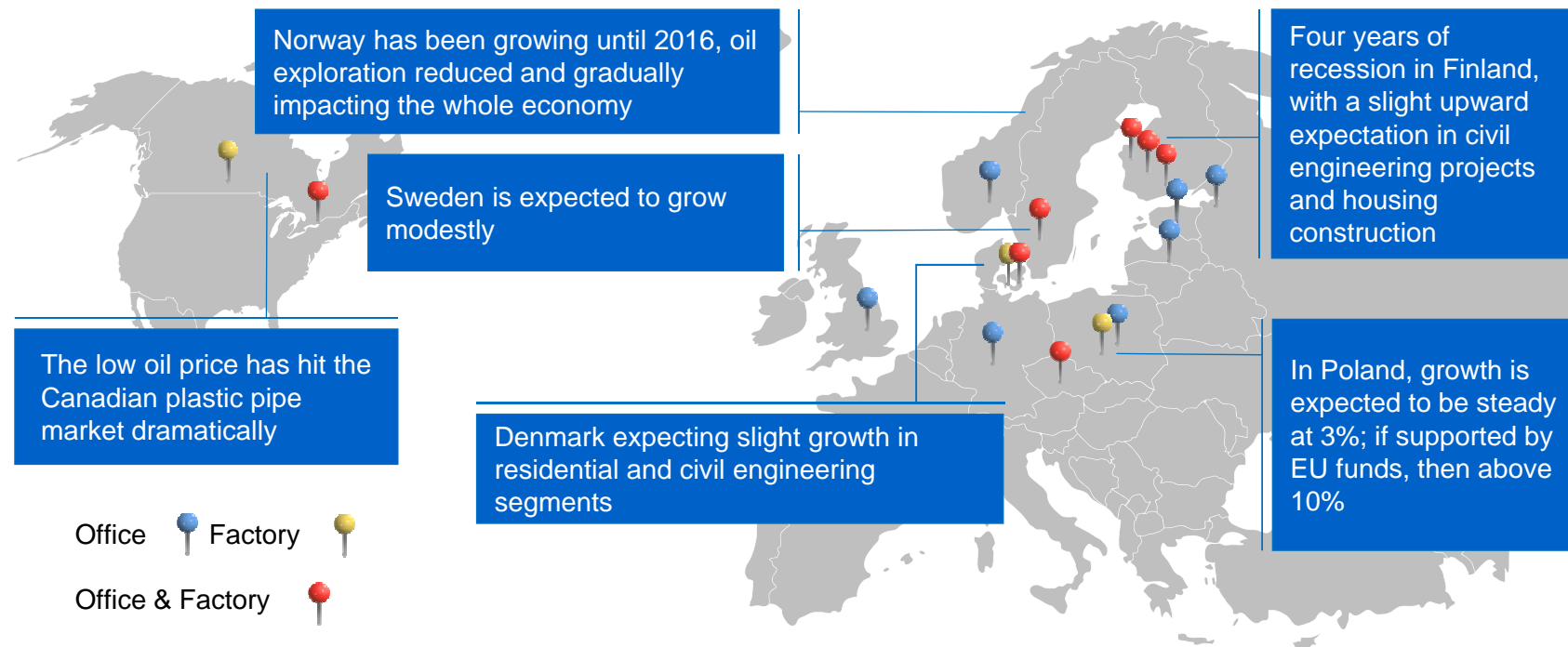
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Market update 2016

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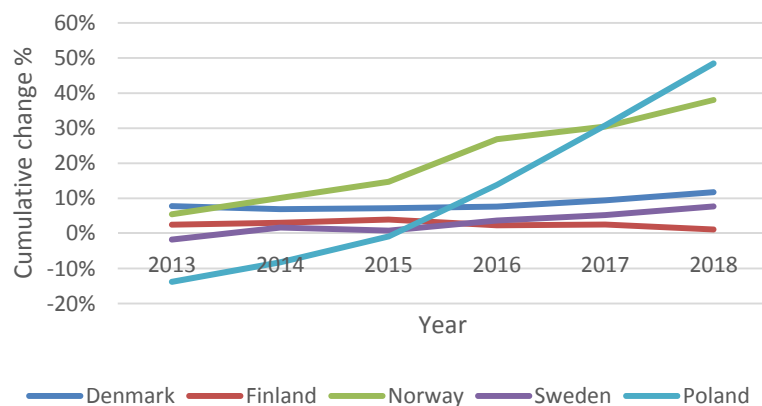


Market outlook

Euroconstruct, December 2015

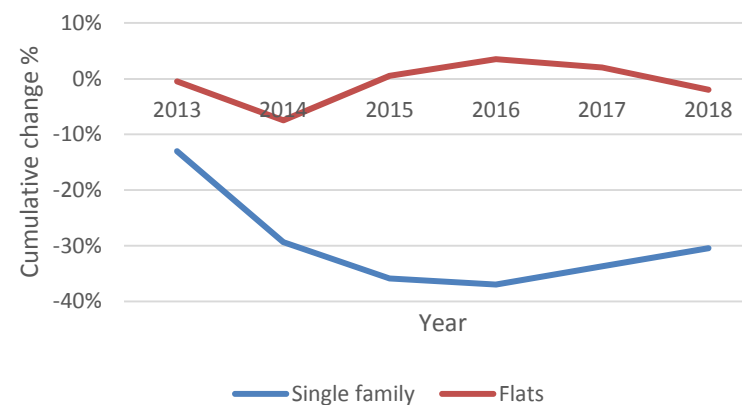


Civil Engineering



- Sweden and Denmark with modest growth
- Finland continues on a flat path
- Norway growth slowing down
- Poland expected to grow with EU funds

Residential development in Finland



- Residential building in Finland moving from single-family homes to flats
 - Less Uponor sales per flat and other materials used

Plastics Pipe Institute Shipments Polyethylene Pipe, Tube and Conduit

(Thousands of Pounds)

RELEASED: April 29, 2016

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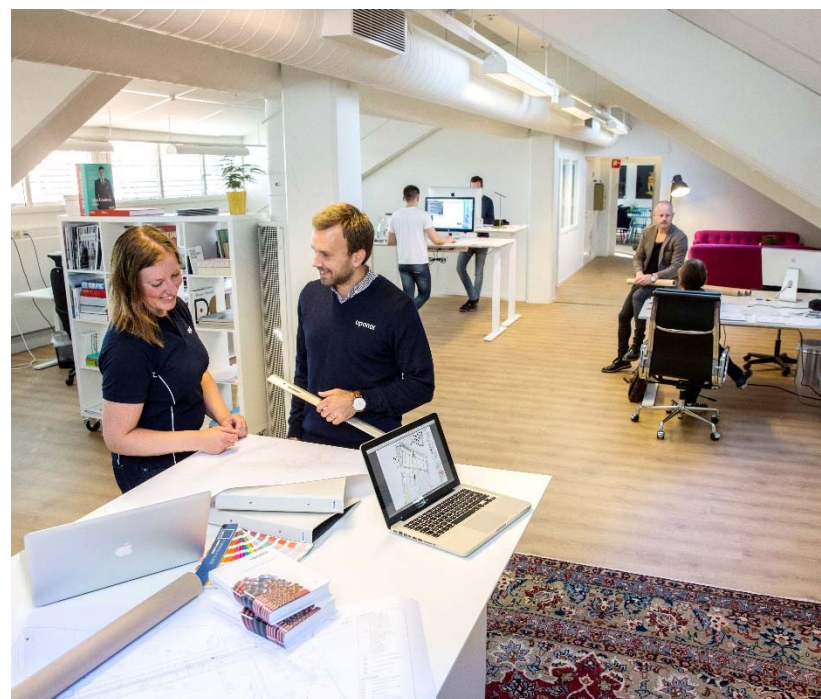
CATEGORY	SHIPMENTS					
	March 2016			Year-to-Date		
	2016	2015	% Change	2016	2015	% Change
Potable Water < or = 3 in.	6,655	4,839	37.5%	14,133	11,920	18.6%
Potable Water > or = 4 in.	22,888	22,475	1.8%	69,562	60,866	14.3%
Total Potable Water	29,543	27,314	8.2%	83,695	72,786	15.0%
Non-AWWA Process Water	2,511	2,916	-13.9%	8,989	7,995	12.4%
Irrigation/Agriculture	4,245	3,010	41.0%	7,773	7,054	10.2%
Geothermal	781	826	-5.4%	2,347	2,027	15.8%
Gas Distribution	20,958	20,980	-0.1%	48,084	51,048	-5.8%
Oil & Gas Production	19,761	30,800	-35.8%	69,674	112,731	-38.2%
Landfill	643	650	-1.1%	1,731	1,746	-0.9%
Industrial & Mining	11,870	15,910	-25.4%	28,788	39,521	-27.2%
Sewer & Drain	4,210	10,020	-58.0%	12,234	19,572	-37.5%
Conduit	24,691	20,052	23.1%	61,981	52,826	17.3%
Other ⁽¹⁾	1,754	2,004	-12.5%	3,595	5,274	-31.8%
Total U.S., Mexico & Canada	120,967	134,482	-10.0%	328,891	372,580	-11.7%
Export	1,372	214	541.1%	4,334	1,195	262.7%
TOTAL	122,339	134,696	-9.2%	333,225	373,775	-10.8%

Market decline related to oil and gas, which is increasing competition. Development difficult to forecast.

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Financial outlook

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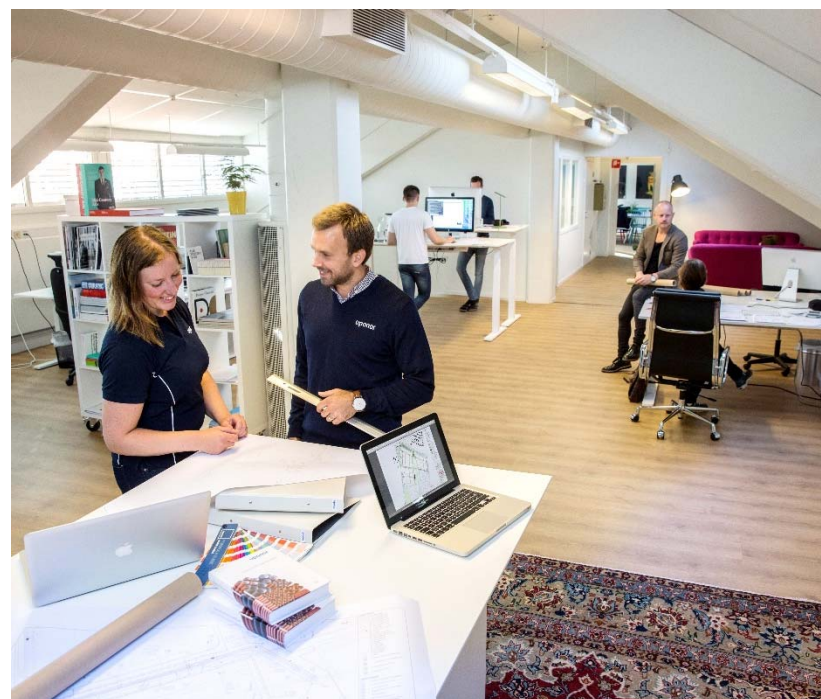
- Transformation programme is progressing according to plan
- We aim at a mid-single digit operating margin and accelerated capital turnover
- Financial improvements are driven by streamlined operations and design solutions sales strategy



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Uponor's strategy to generate sustainable growth in the shorter and longer term

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2016: Focus on customer needs

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Standard project sales



Streamline

System on stock sales



Streamline & maintain cash generation

Designed solutions sales



Focus on growth

2016: Focus on innovation

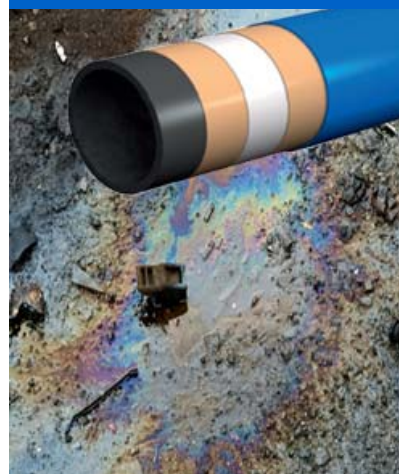
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Uponor Fish Feed



Sustainable fish feeding pipe
for the fishery industry

Uponor Barrier PLUS



The first high safety potable
water pipe system for
brownfield installations

Uponor Decibel



Excellent noise reduction in combination with good design, suitable
for both new build and renovation

Construction of flats in main
cities has increased

2016: Focus on services

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Designed solutions references

Turn key reference: Enormous cooling capacity

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Project

Cooling water intake and outfall to the Philippines' largest oil refinery

Challenge

Marine installation

Solution

Welding and installation on seabed. We have patented the installation process

Customer

Petron Bataan Refinery



Turn key reference: An 1.8km infra culvert with all media

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Project

New residential area infrastructure, Sweden

Challenge

High groundwater, poor soil conditions and soil containing a lot of clay, silt and stones

Solution

Calculations, dimensioning and installation of an 1.8km infra culvert (dimension ID 2200mm) made of Weholite® – in partnership with Tekniska verken AB

Partner

Tekniska verken AB, Linköping



Turn key reference: Water recycling in the fishery industry

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Project

Water recycling at a fish farm, Åland (FI)

Challenge

New plant with a need of water distribution and recycling. Limited installation area.

Solution

A smart solution including design know how, product quality and professional site work. We helped the customer to a more simple solution requiring less maintenance.

Customer

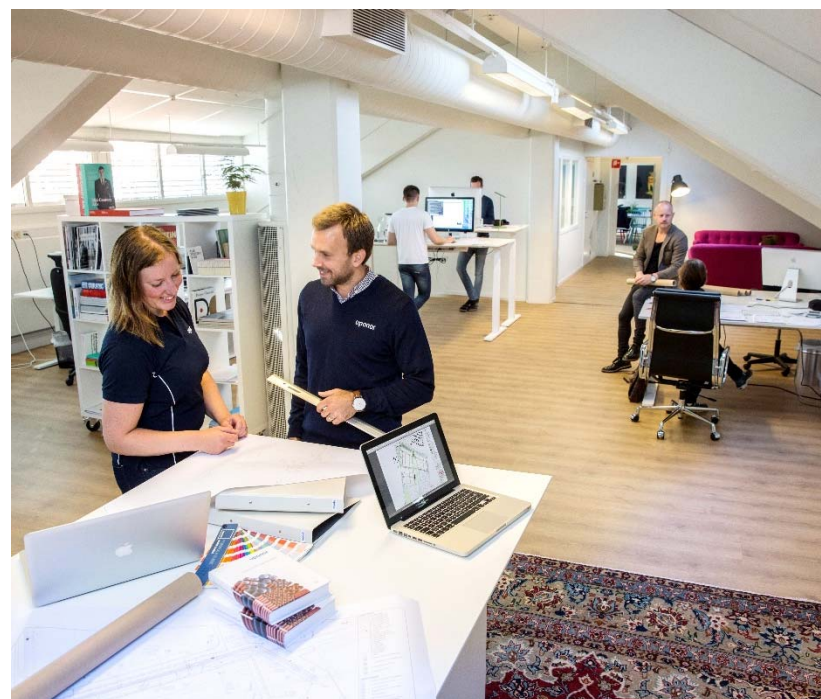
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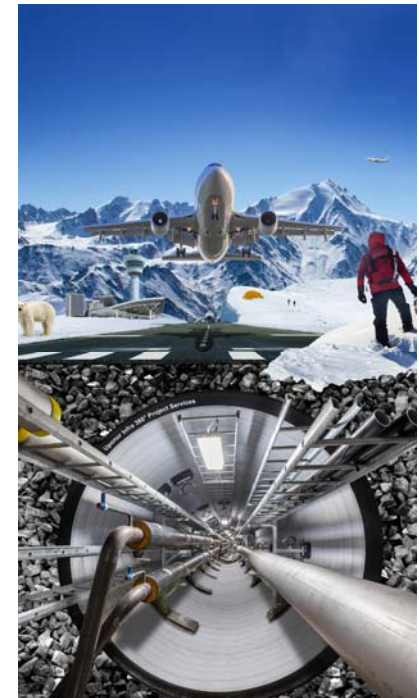
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Summary

- No material growth in the infrastructure markets
- Transformation programme is progressing according to plan
- New products launched in 2016 supporting our focussed strategy, aligned with Group strategy
- Targeting improvement in financial performance

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Uponor Infra – Building a new focus around core competencies

Q&A

Sebastian Bondestam
President, Uponor Infra



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Building Solutions – North America

Steady the course, full steam ahead

Bill Gray
President, Building Solutions - North America
2 June 2016

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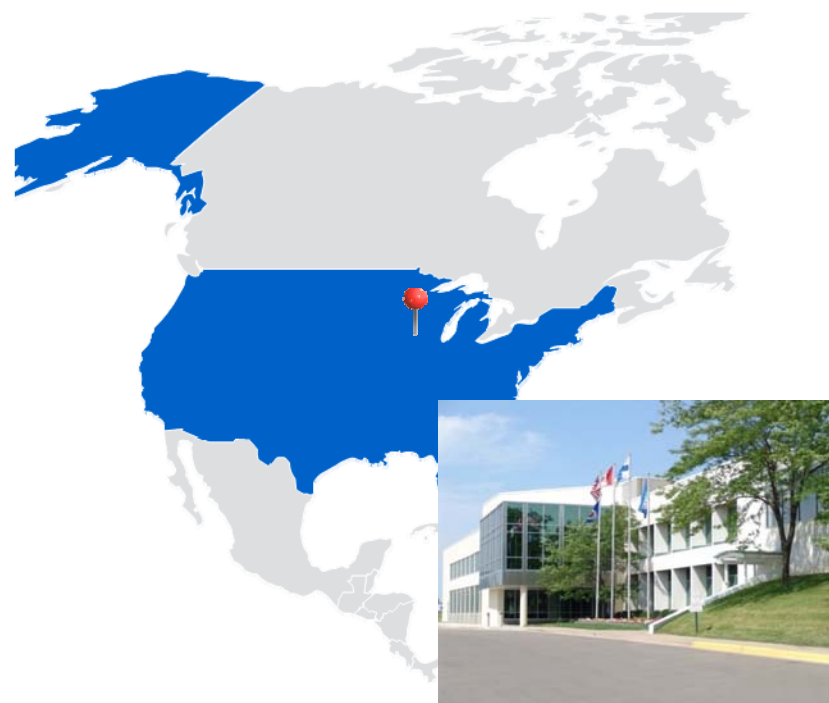
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Who is Uponor Building Solutions – North America?

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- Headquartered in Apple Valley, Minnesota (since 1990)
- 2015 Sales: ~\$304.6 million
- More than 1/3 of all PEX tubing sold in North America
- Over ~5 billion feet of PEX tubing produced



Building Solutions – North America locations

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Apple Valley, Minn. – Headquarters

Lakeville, Minn. – Distribution Centre / Customer and Technical Support

Mississauga, Ontario – Canadian Headquarters / Sales / Customer Service

Calgary, Alberta – Distribution Centre

Brampton, Ontario – Distribution Centre

Regina, Saskatchewan – Technical Design Centre

Laval, Quebec – Sales



Building Solutions – North American headquarters

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Milestones

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3 Strategy and focus

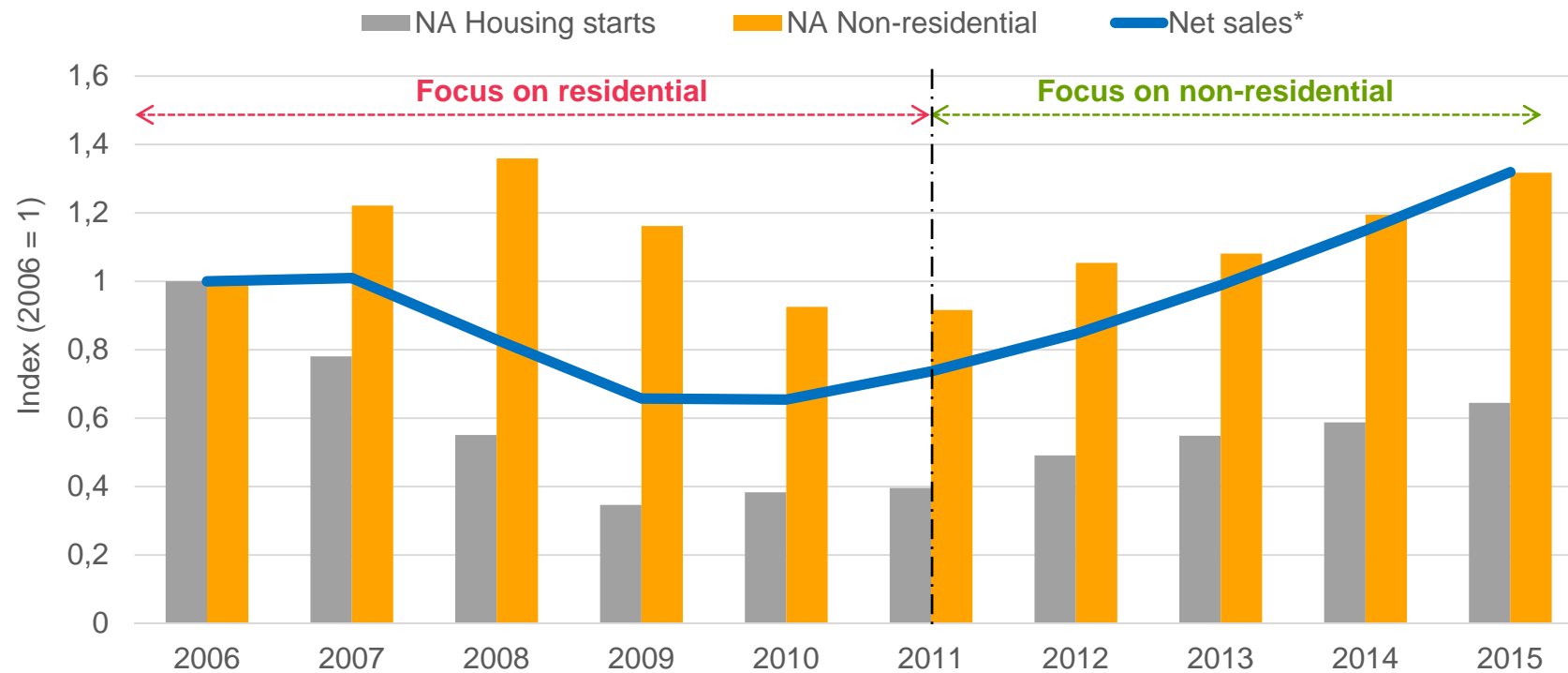
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Net sales* vs. construction activity

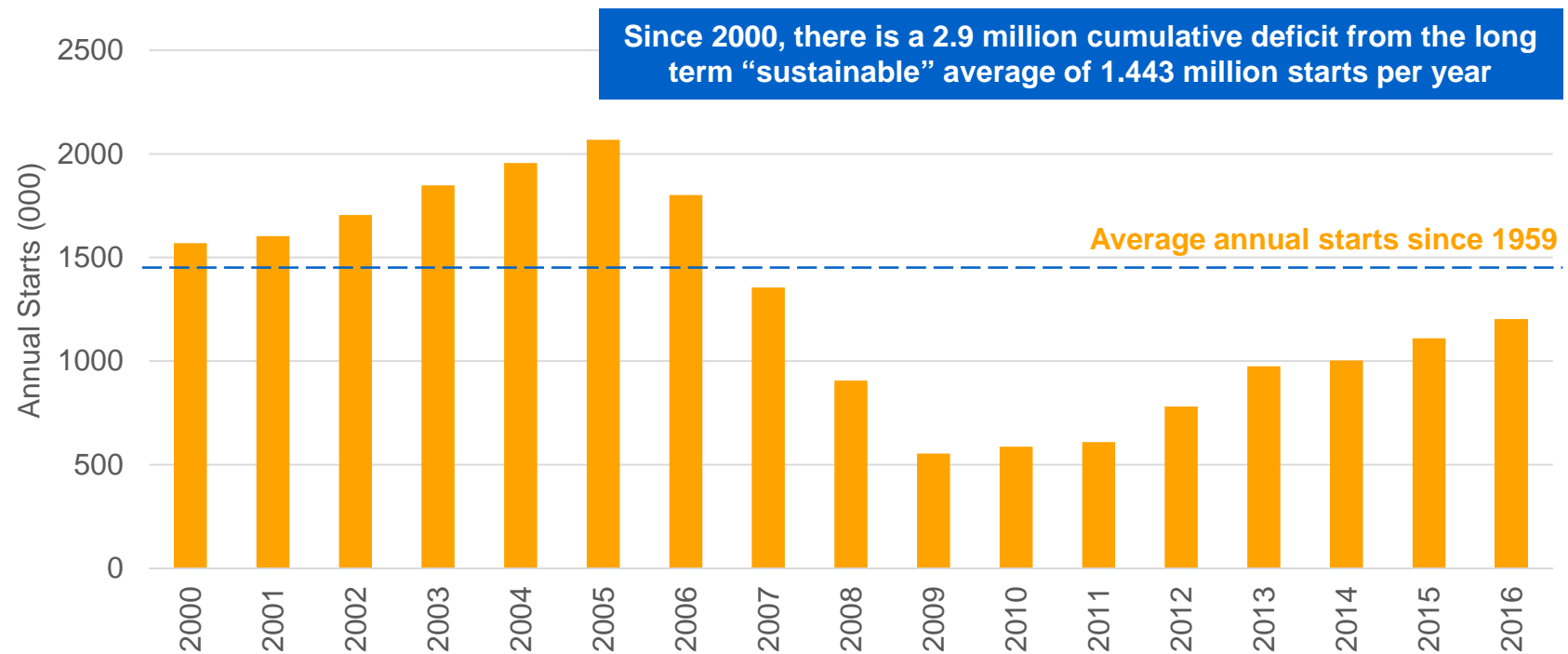
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* Building Solutions – North America

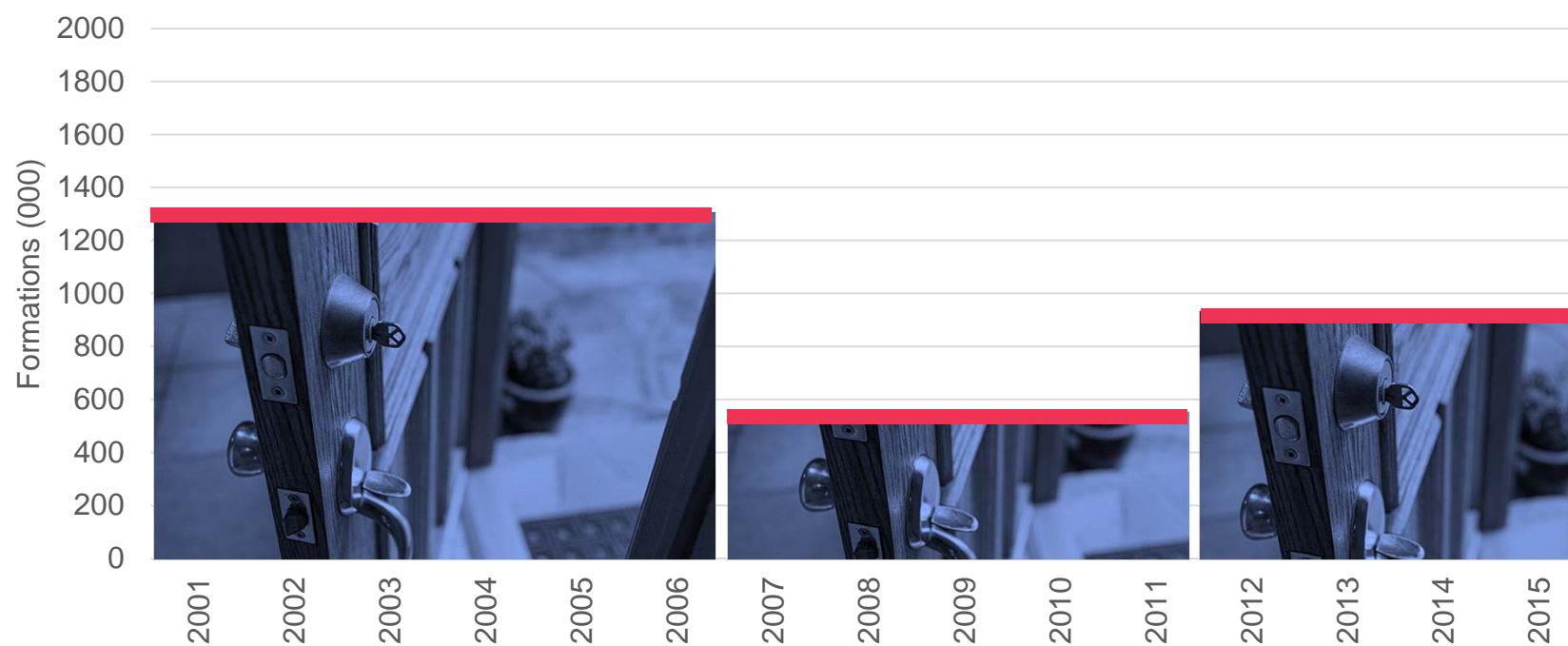
U.S. housing starts

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Household formations

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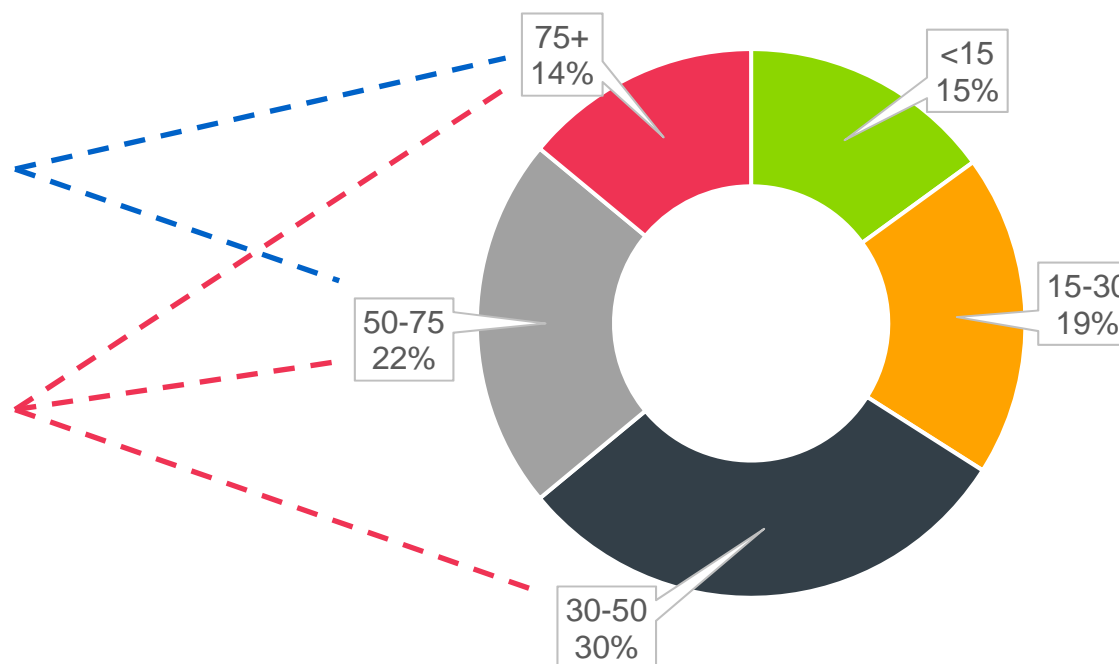


Age of U.S. housing inventory

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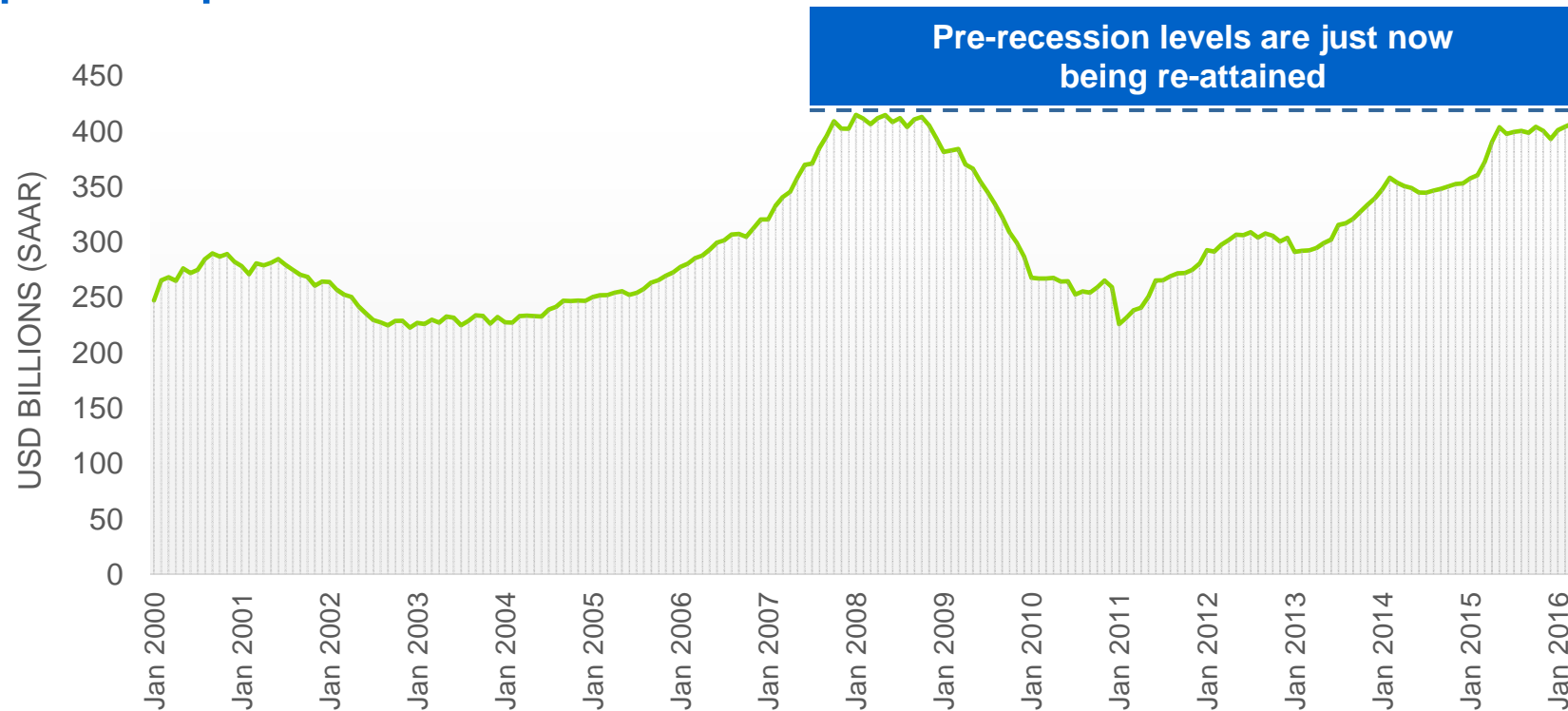
About 1/3 of the housing inventory is more than 50 years old

2/3 of the housing inventory is more than 30 years old



U.S. non-residential construction put-in-place

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Focused investments enabling growth



- Bays 4B, 5A and 5B - capacity expansion
- Ecoflex production line - product innovation
- Lakeville, Calgary, Brampton distribution centers
- Apollo Technology (PEX-X) - product innovation
- Remodeled Apple Valley Training Center
- Resin receiving facility - improved margins
- Automated packaging line - improved margins, sustainability
- 3rd mixing operation
- Renovation/expansion of Annex facility (2015)
- Close to 60% growth of PEX extruders from 2011 to 2015

<i>MUSD</i>	2010 % NS	2011 % NS	2012 % NS	2013 % NS	2014 % NS	2015 % NS
Net Sales	151.1	170.0	195.4	228.2	265.2	304.6
Operating Profit	4.5 3.0%	12.6 7.4%	21.3 10.9%	33.0 14.5%	41.6 15.7%	56.3 18.5%
Capital Investment	5.7	4.7	7.7	20.8	15.0	25.0
	\$78.9					

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Uponor's strategy to generate sustainable growth in the shorter and longer term

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Uponor value chain

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Keeping focus on core markets

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Residential New
Home Construction



Multi-Family
Living



Institutional /
Educational



Senior /
Assisted Living



Hospitality /
Hotels

RESIDENTIAL



Residential
Re-Pipe



Industrial / Office
Buildings /
Government Buildings



Hospitals /
Clinics



Retail /
Shopping
Malls



Commercial
Re-Pipe

COMMERCIAL



Intimately understanding the customer(s)

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Uponor Sales Team Manufacturing Reps

Sell to Distribution
Influence Decision Makers Support Installers

Residential Contractors Mechanical Contractors

Purchase & install product & solutions



Home Owner





Distributor/Buying Group Management Distributor Purchasing Agent Distributor Counter Sales

Stock products Sell products to installers







Engineers Architects Estimators Developer/ Building Owner Regional/Custom Builders






Facility Managers General Contractors National Builders AHJ Contact

Specify, design, approve, allow our products for projects

National builder focus



- **Uponor has exclusive agreements with 3 of the Top 10 U.S. builders and does business with the remaining 7**
- **Amongst the top 10 builders Uponor has a 60% share of their housing starts**
- **In addition to the direct sales impact these relationships create, an equally substantial value is created by leveraging the builder relationships to convert contractors to Uponor offerings**
- **Strategy for success**
 - Dedicated focus on developing builder relationships and driving programs
 - Leveraged Uponor's value proposition around liability management
 - Ability to manage National decisions into the local markets – ensures execution after hand-off
 - Worked with builders to jointly manage construction liability
 - Top down / bottom up strategy – Builder / Contractor / Distributor

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Further opportunities for growth

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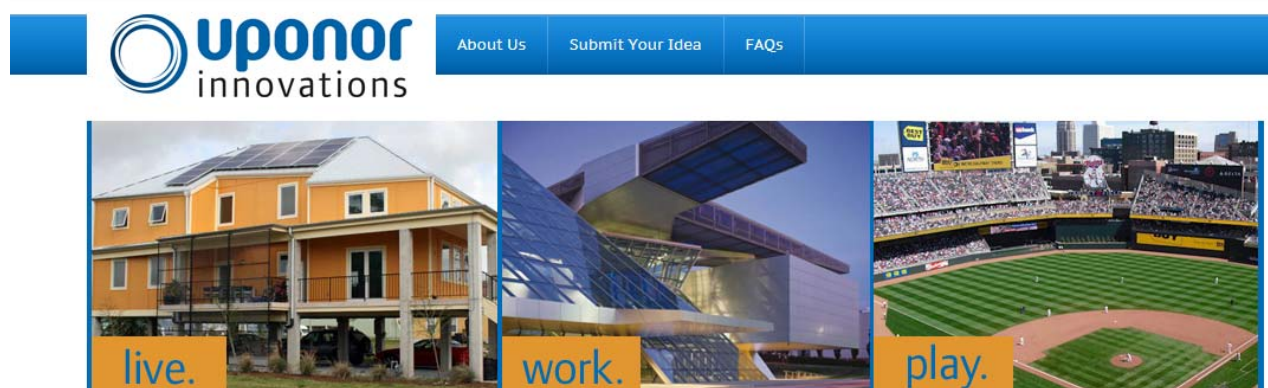
Enhanced customer experience

- Distribution channel alternatives
- Digitalization
- Geographic expansion (Mexico / Central America)
- Products that get us “outside the wall”
- Applications not currently served by PEX
- Services that provide more value
- Sustainable solutions



Inorganic innovation offers a way to invest

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A wholly-owned subsidiary that identifies, fosters, and accelerates innovative ideas & new technologies

Investments to date

- Upstream Technologies (storm water sediment separation baffles)
- Phyn LLC, a joint venture with Belkin International

Promising investigations

- Gray water re-use systems
- Rainwater capture systems for paved surfaces
- Structural floor/wall system incorporating underfloor heating

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Building Solutions – North America will...

- Remain focused on Commercial and defend Residential
- Learn from our customers to enhance the customer experience
- Innovate and create new products to increase market share
- Invest resources to explore new opportunities
- Increase organizational resilience





Building Solutions – North America

Steady the course, full steam ahead

Q&A

Bill Gray
President, Building Solutions - North America



Uponor Capital Markets Day

2 June 2016



8.30 Opening
Uponor strategy update
Jyri Luomakoski, President and CEO, Uponor Corporation

9.00 Building Solutions – Europe: Rethinking for profitable growth in a low growth environment
Jan Peter Tewes, President, Building Solutions – Europe

9.45 Uponor Infra: Building a new focus around core competencies
Sebastian Bondestam, President, Uponor Infra

10.30 Break & Refreshments

10.45 Building Solutions – North America: Steady the course, full steam ahead
Bill Gray, President, Building Solutions – North America

11.30 – 12.15 Lunch

12.15 Site visit and presentation of the Distribution Centre, insulated pipe as well as fittings production

14.00 Group Technology: Reaching beyond the box to respond to global megatrends
Fernando Roses, EVP, Group Technology and Corporate Development

14.30 Q&A

Closing
Jyri Luomakoski, President and CEO, Uponor Corporation

15.00 – ca 18.00 Bus transportation to Frankfurt Airport, Terminal 2 and 1

A wide-angle, nighttime photograph of the Frankfurt am Main skyline. The city's lights are reflected in the Main River, which flows through the center of the image. Several bridges are visible, including the Main Bridge (Mainbrücke) in the foreground. The sky is a deep blue, and the city lights create a warm, golden glow.

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Hassfurt site visit

2 June 2016

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Fitting production

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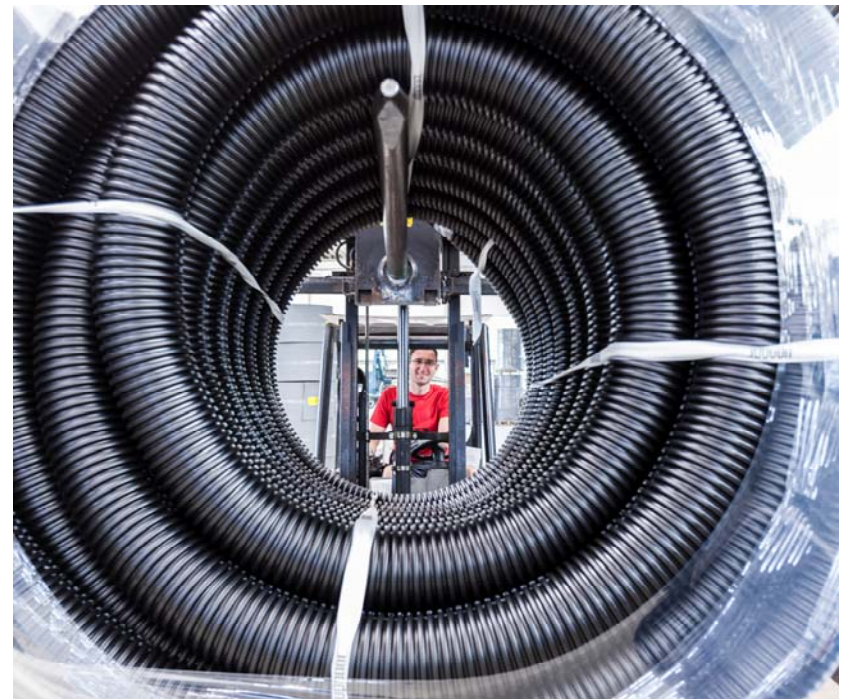
- Since 1992, altogether 1 billion fittings have been produced
- In 2015, total output 58 million fitting components, of which 30 million fittings were assembled
- Brass consumption at 6,700 tons per year
- 4,800 tons of chips and waste are recycled
- 128 employees



Pre-insulated pipe production

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- Since 2015, production of pre-insulated pipes up to 250mm outer diameter
- Cut-to-measure capabilities for customer/project-specific orders
- Monthly output 60,000 metres
- Production in 120 h shift model with 6 operators



Warehouse & Distribution Centre

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- Warehouse was built in 2014, go-live in March 2015
- 15,500 sqm indoor and 10,000 sqm outdoor space
- 48 employees and 7 trainees
- 0.5m order lines/year (appr. 2,200 orders/day) from 80 different countries
- 60 trucks per day (inbound and outbound)



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Enjoy the tour!

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Reaching beyond the box to respond to global megatrends

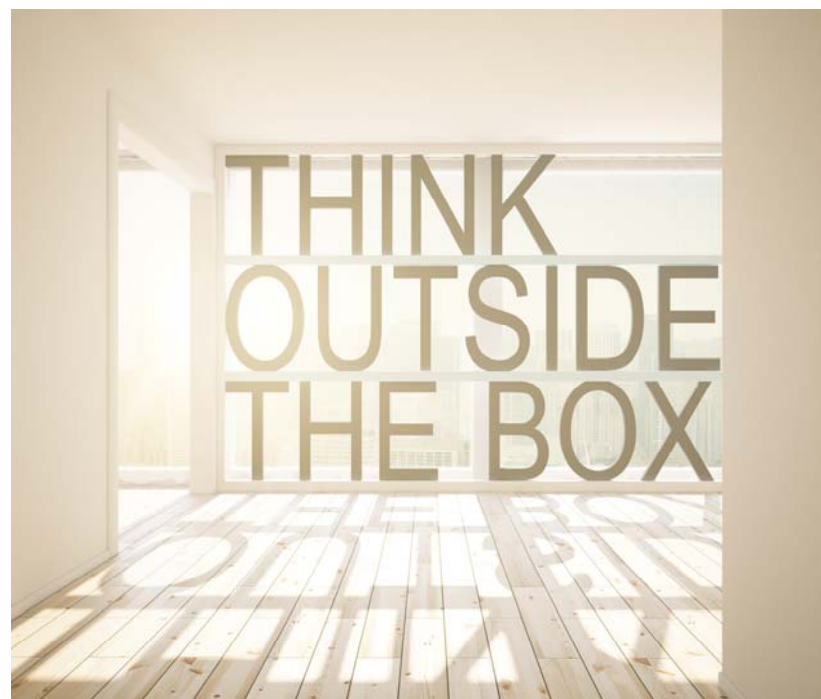
Fernando Roses
Executive Vice President, Group Technology and Corporate Development
2 June 2016

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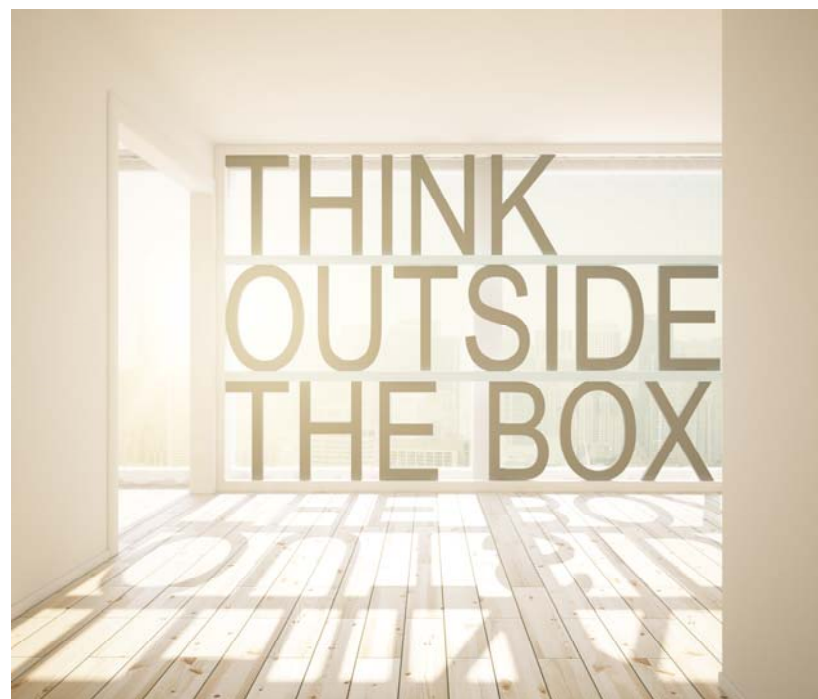
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Already during the Roman Empire...

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Pressurising water by means of

- gravity
- a pump, or
- a water wheel driven by water stream



Has caused the water to flow through

- an aqueduct or
- a pipe



To the point where a person wanted to use the water



After which the water has been dispersed back to the ground or a nearby lake

Today's water distribution systems are more similar than different...

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... from those of the Roman Empire:

- Dominant plumbing systems have changed from galvanised iron pipe to copper tubing to CPVC and to PEX
- These changes have dramatically changed the methods of installing the pipe as well as who is providing the materials
- Despite these changes, plumbing has essentially continued to provide the same function over the centuries. And while it will continue to provide that essential function...

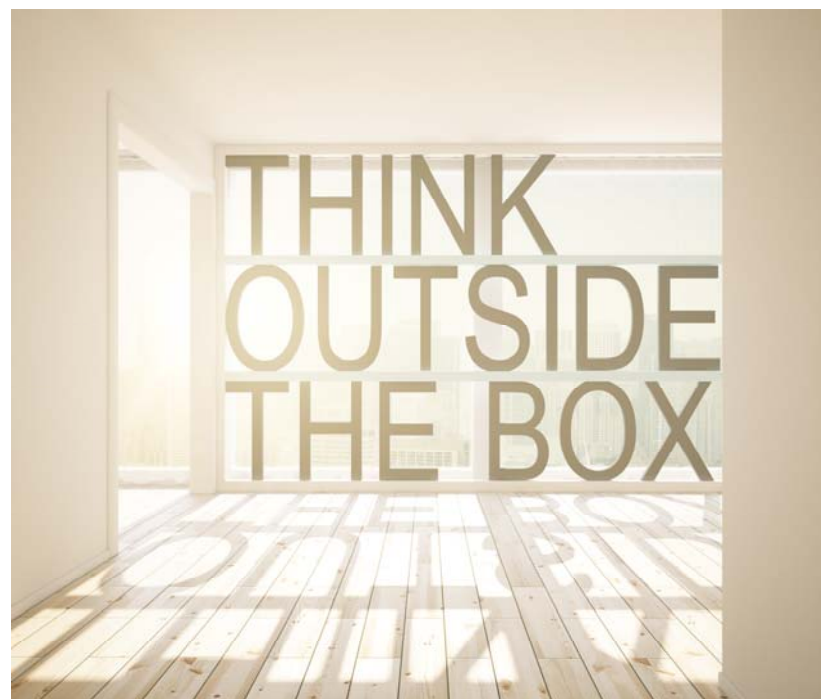


We at Uponor believe that real change is finally coming to plumbing. Yes, that could mean a new material will again replace the piping network or the fittings to connect them but that is not the only change we are anticipating.

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Megatrends affect societies fundamentally and over a long period of time

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Climate change
and scarcity of
resources



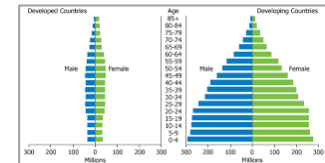
Urbanisation



Digital
transformation



Shift of economic
power towards
emerging
markets



Demographic
split to aging and
growing
populations



New product and technology
requirements



Water systems
will become
more intelligent

Combination of climate change, urbanisation, aging infrastructure and scarcity of resources

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Urbanisation

- More surface area covered
- Bigger cities
- Need for efficient construction process

Aging buildings and infrastructure

- Losses in water systems
- Hygiene issues

Climate change alters rainfall patterns

- Wet areas get wetter
- Dry areas get dryer

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- Energy efficiency
- Environmental impact
- Water efficiency
- Recycling of water

Scarcity of resources

... creates interesting product and technology opportunities

- Increased need for storm water management systems
- Requirements for cleaning storm water to avoid lake and ground water contamination
- Larger dimensions of pipes needed
- Pre-fabricated elements

Urbanisation

- More surface area covered
- Bigger cities
- Need for efficient construction process

Aging buildings and infrastructure

- Losses in water systems
- Hygiene issues

- Non-leaking pipelines help save significant amounts of clean water
- Preventing leaks in sewage systems is an important environmental task
- Hygienic pipe systems lower the risk of drinking water contamination

Climate change alters rainfall patterns

- Wet areas get wetter
- Dry areas get dryer



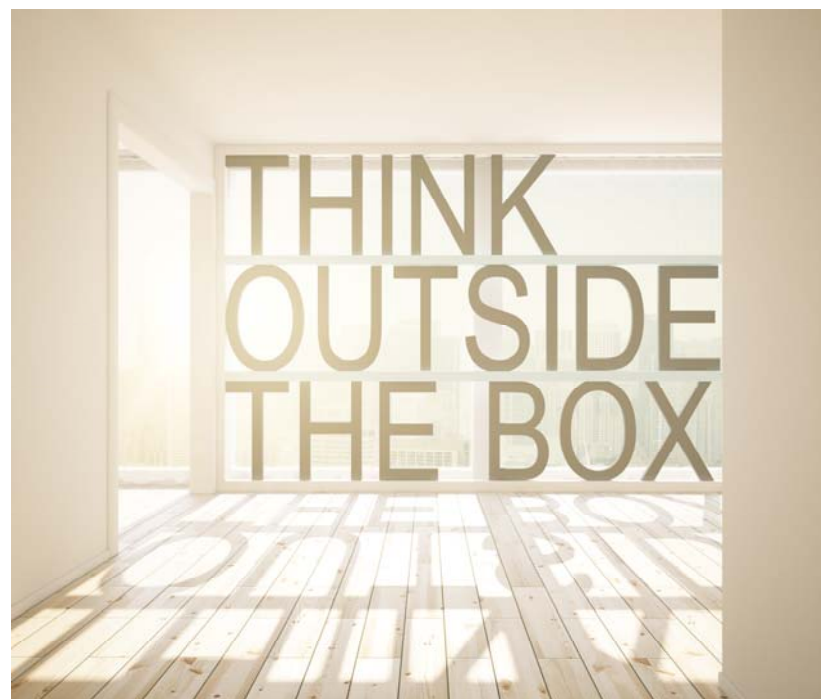
- Energy efficiency
- Environmental impact
- Water efficiency
- Recycling of water

Scarcity of resources

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Water systems will become more intelligent

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Climate change

Urbanisation

Aging buildings
and infrastructure

Scarcity of
resources

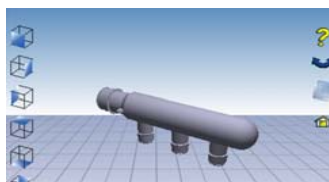
Digitalisation

- Energy management
- Smart utilisation of renewables
- Prediction of extreme weather events

- Smart cities, buildings and infrastructure
- Construction process efficiency
- Installation capacity and competence challenges

- Predictive maintenance
- Fault detection and diagnosis
- Performance upgrades to existing buildings and infrastructure

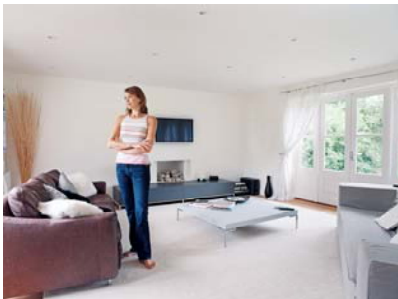
- Water efficiency and conservation
- Water quality management
- Smart product tracing, recycling and reuse of materials



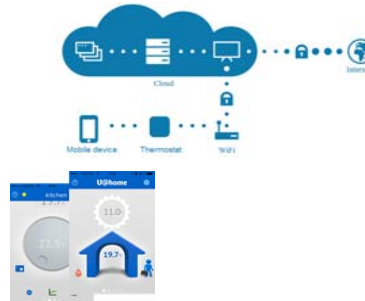
Intelligent management of indoor climate benefits people, planet and profits

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Indoor climate solutions with health and productivity benefits



Digitalisation and embedded intelligence as enablers



Reduction of emissions and sustainable use of resources



- Intelligent heating and cooling in smart homes and offices
- Optimised integration of heating, cooling and ventilation
- Predictive and adaptive control of the thermal environment
- Solutions for optimised utilisation of renewable energies

Uponor supports builders in improving the efficiency of the construction process

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Construction industry is facing an increasing need for **efficiency**

- 1 Long lead times increase uncertainty and capital employed
- 2 Increasing expectations from consumers for customised features
- 3 Scarcity of skilled labour



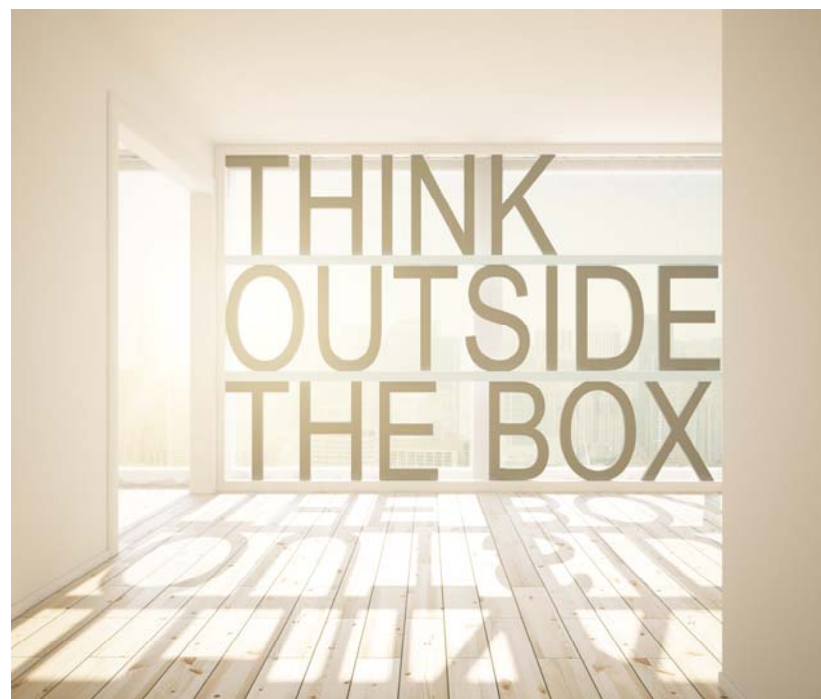
Uponor is part of the solution

- Increasing portfolio of pre-fabricated elements
- Building Information Models (BIM) created for thousands of catalogue items
- Uponor solutions offering designed for professional builders
- Uponor develops tools to increase efficiency, suitable also for work force with different skills levels

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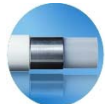

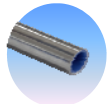



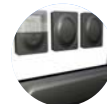

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Recent Uponor innovations

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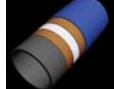
Building solutions: Europe and North America

								
2011	2013	2014	2014	2015	2015	2015	2015	2015
The best cordless expander tool for a quick and easy installation	SACP Technology, the first seamless aluminium composite pipe	Comfort Pipe PLUS, the most flexible Uponor PEX pipe for radiant heating and cooling	The world's first multi-layer composite pipe with metallic look and feel	U@Home App for easy control and aftersales service to end users	HeliPEX launch in Canada marked the first new crosslinking method for PEX in 40 years	Propex tool and all fittings for Very Large Diameters – through 3"	Intelligent monitoring of heating and cooling devices for comfort and energy savings	Fully integrated way to remotely monitor and alarm for water quality deterioration

2010

2016

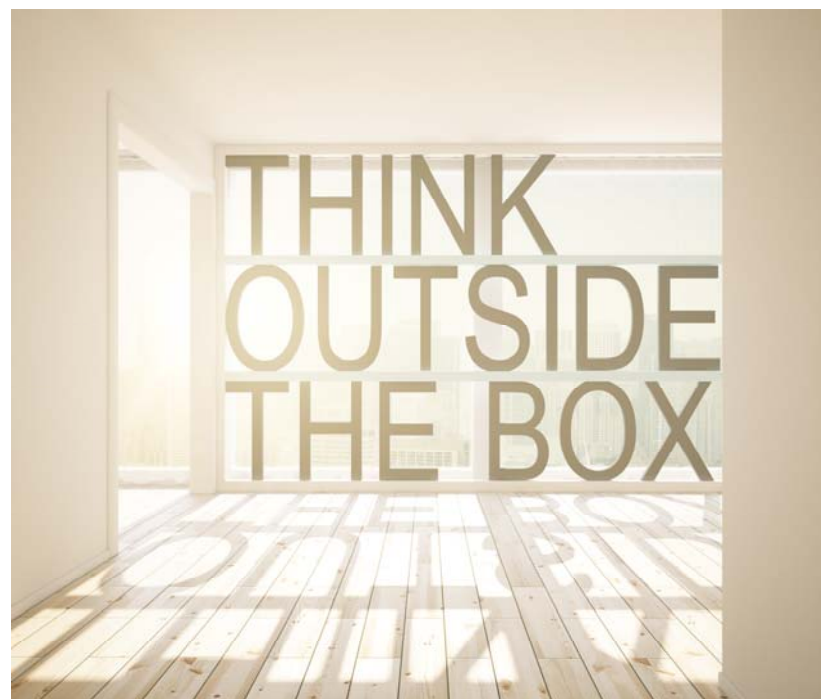
Infrastructure solutions

								
2010	2011	2011	2013	2013	2014	2015	2016	2016
Uponor IQ – a smart and sustainable storm water pipe system for dimensions 200-1200 mm	Clean 1, digital monitoring of waste water treatment	Peat filter for greywater cleaning	Wehopanel chamber saves installation time with prefabricated cubic shaped tanks and chambers	Ultra Classic, sustainable sewer pipe range with reduced carbon footprint	IQ Infiltration pipe system for easy maintenance	Infra Culvert including all media	Decibel, a noise reduced soil & waste system	Barrier PLUS potable water pipe system for installation in contaminated soil

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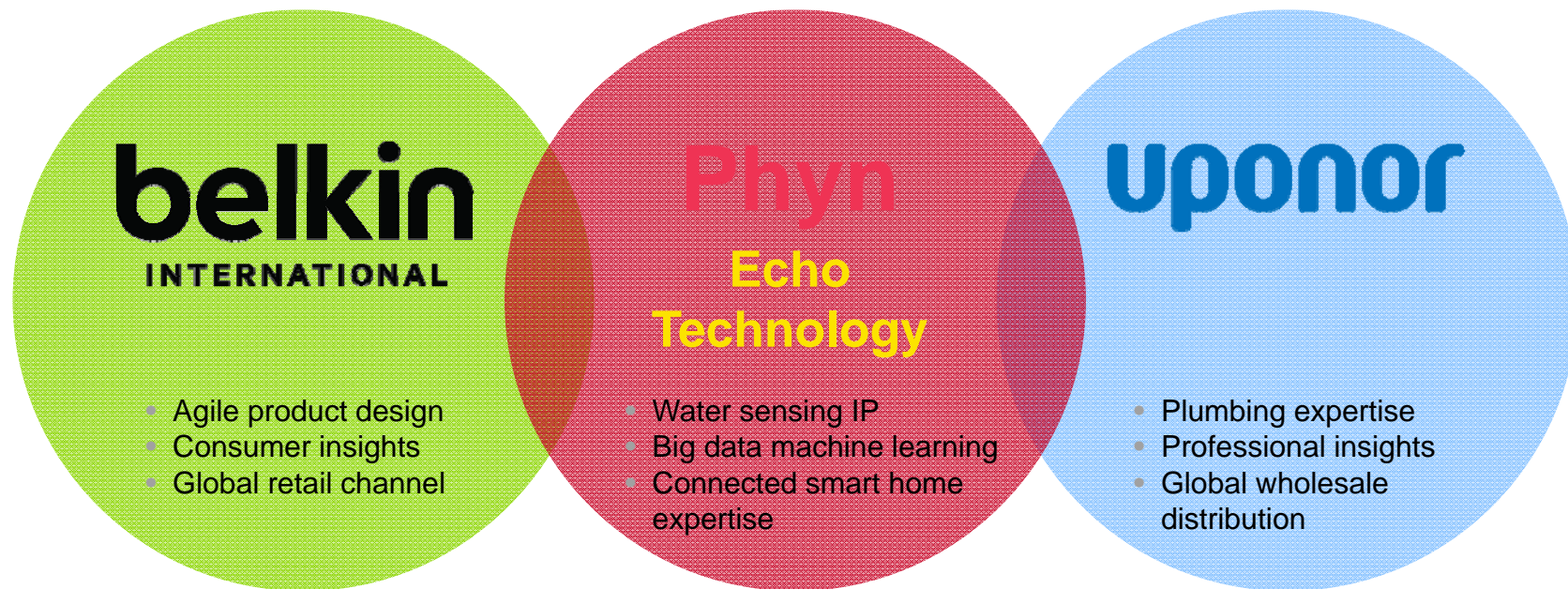
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Phyn – a joint venture* to develop and commercialise water sensing technology

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* Closing expected in July 2016 subject to regulatory approvals and other customary closing conditions

Echo technology is a pioneer in water sensing

Accurately monitors and helps manage how water is used in your home

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- Echo technology senses water pressure changes that occur throughout your plumbing system every time you use water
- Echo's advanced machine learning-based algorithms
 - analyse vibrations and accurately identify every fixture in your home—from shower to toilet to irrigation—and log when each is used and for how long
 - calculate water consumption by fixture
- Helps use water more efficiently; can identify leaks and other potential problems—before they become serious

Next steps

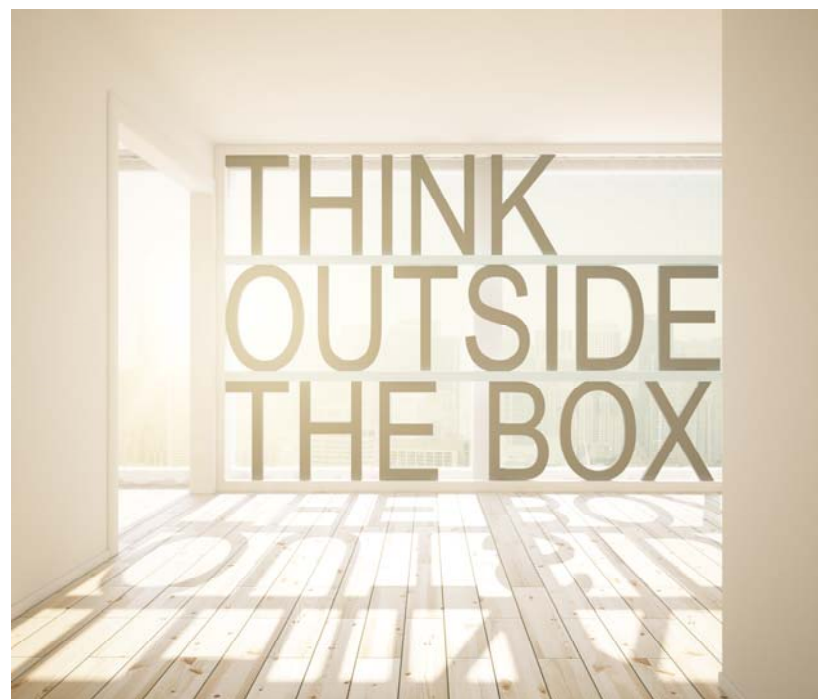
- Over the next 12–16 months hundreds of test units will be installed into U.S. homes in order to obtain real time learnings and experiences
- After the field test, learnings will be incorporated into the product and cloud network
- The first product launch targeted toward 2017/2018



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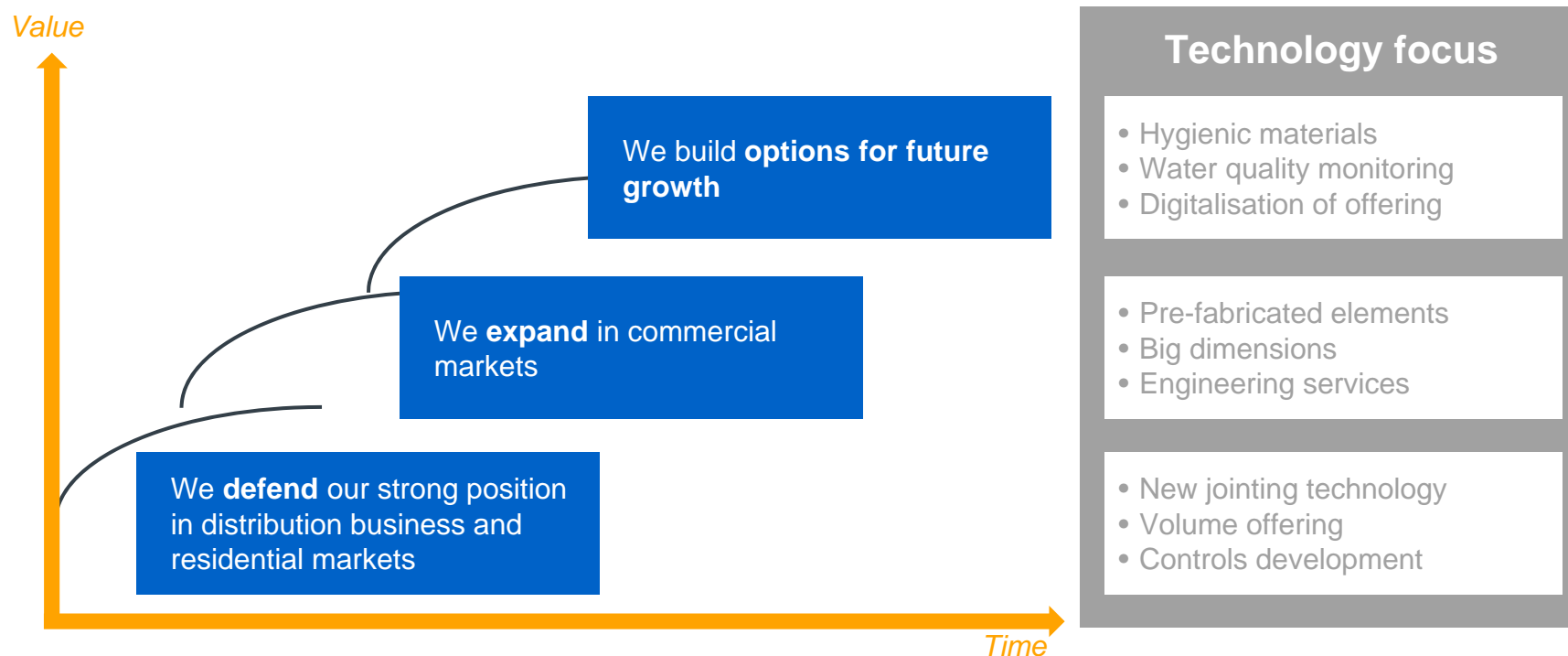
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Technology development supports Uponor's strategy to generate sustainable growth

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Reaching beyond the box to respond to global megatrends

Q&A

Fernando Roses
Executive Vice President, Group Technology and Corporate Development





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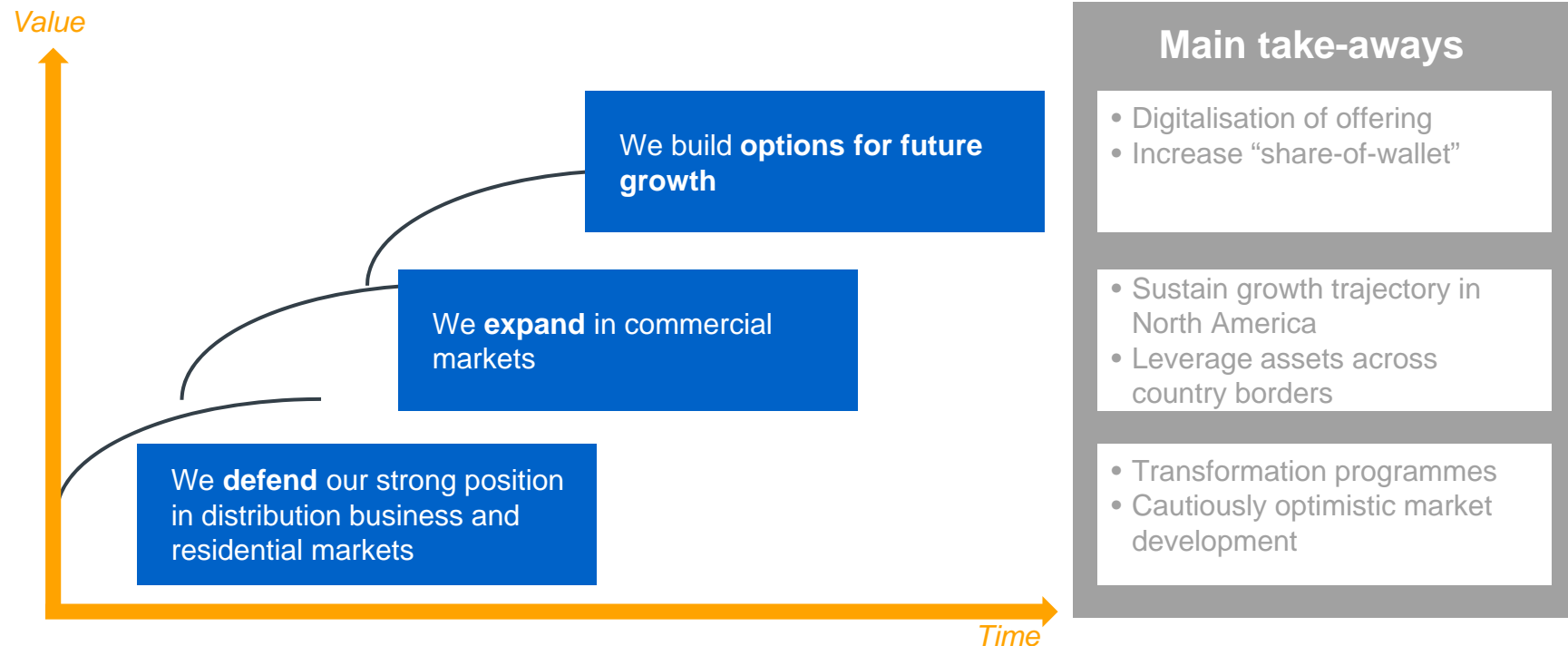
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Jyri Luomakoski
President and CEO
2 June 2016

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Uponor's strategy to generate sustainable growth in the shorter and longer term

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Thank you & good-bye!

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