

FACILITY SERVICES FINLAND

ANTTI NIITYNPÄÄ
SENIOR VICE PRESIDENT



FACILITY SERVICES FINLAND

**THE MOST
SUSTAINABLE
PARTNER FOR THE
WHOLE LIFETIME OF
CUSTOMER'S FACILITY**



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WE IMPROVE THE VALUE OF PROPERTIES AND END-USER EXPERIENCE

BUSINESS LINES

Cleaning and support services

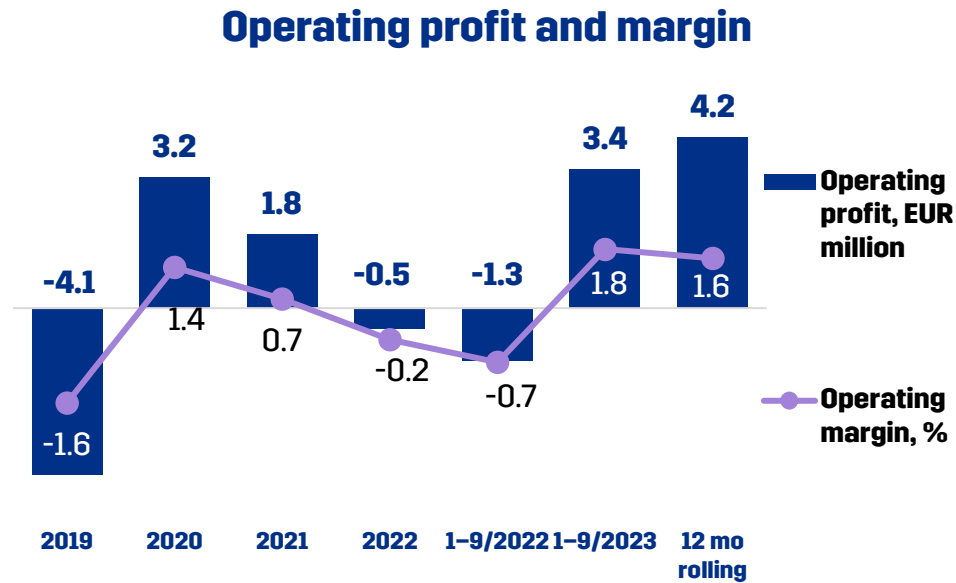
- Office and property cleaning
- Special cleaning services
- Facility support services

Property maintenance

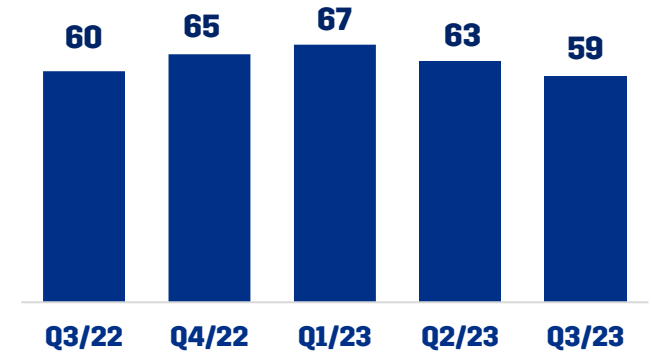
- Building maintenance
- Outdoors maintenance
- Facility management services

Technical services

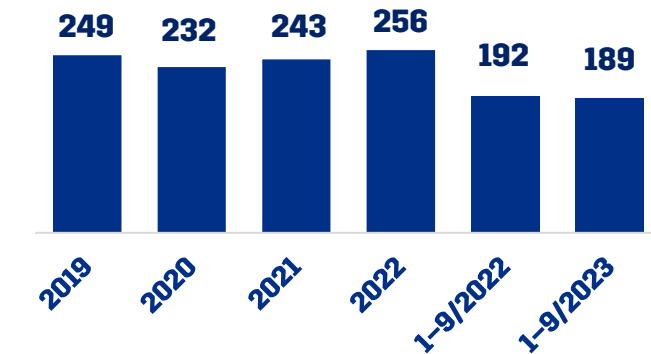
- Technical maintenance
- HVAC services
- Energy management services



Net sales by quarter (MEUR)



Net sales (MEUR)



CITIES CONTINUE TO GROW AND EXPECTATIONS CONCERNING THE CONSTRUCTED ENVIRONMENT ARE INCREASING

76%

of the property sector say that they will impose sustainability requirements on their partners

45%
of Finland's national wealth is in buildings

The property and construction sector is responsible for
35%
of energy consumption

Built environment maintenance backlog
EUR 30–50
billion

Sources: KTI Vastuullinen kiinteistöliiketoiminta, RIL, Motiva, Confederation of Finnish Construction Industries RT



GROWING END-USER AND CUSTOMER EXPECTATIONS CREATE NEW OPPORTUNITIES



	CLEANING AND SUPPORT SERVICES	PROPERTY MAINTENANCE	TECHNICAL SERVICES
L&T POSITION IN CURRENT MARKET	#2-3	#3-4	#7-9
RELEVANT MARKET SIZE (BEUR)	2.5	3	
ANNUAL MARKET GROWTH	2-4%		

Sources: L&T management estimate

Tailwinds

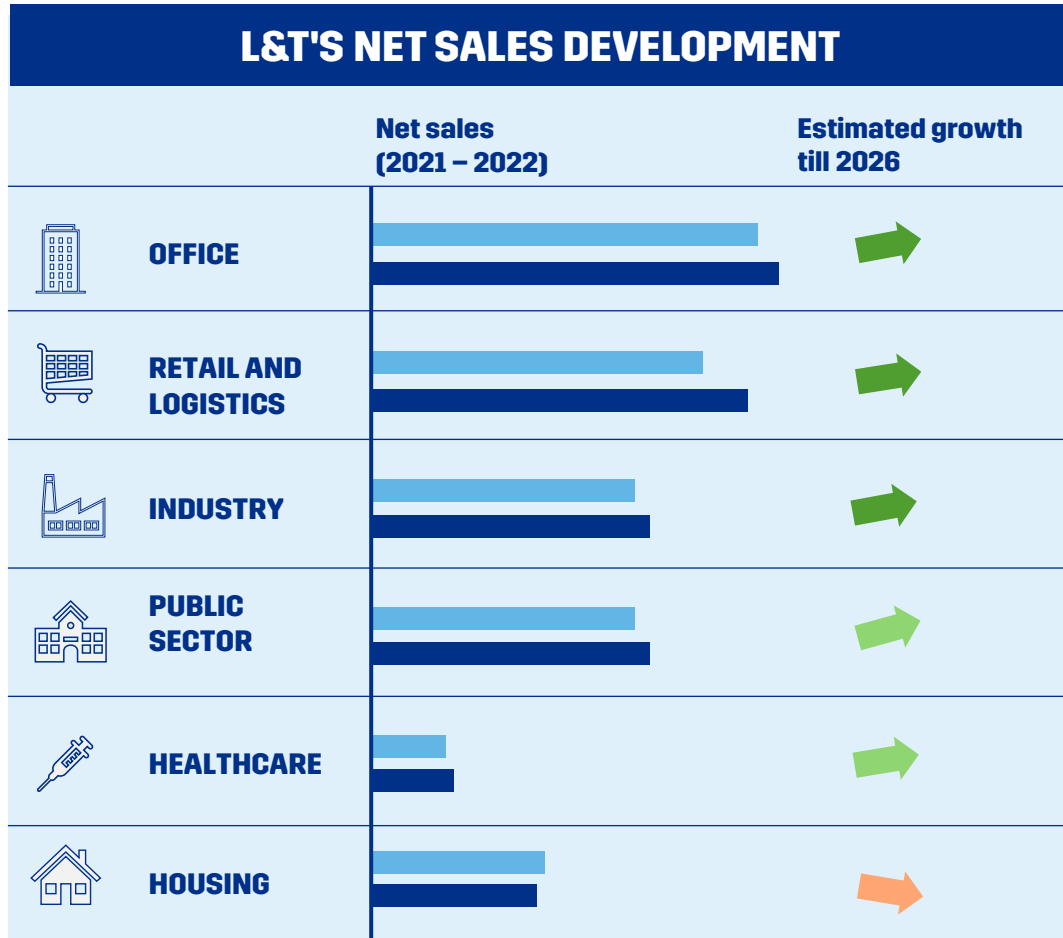
- Facilities and buildings are becoming more technically demanding and digital
- Sustainability and climate change mitigation are in focus in the customer base
- The amount of public sector outsourcing is growing

Headwinds

- Availability of labour
- Price competitiveness of the facility services industry



SEGMENT EXPERTISE SUPPORTS GROWTH IN SELECTED SEGMENTS

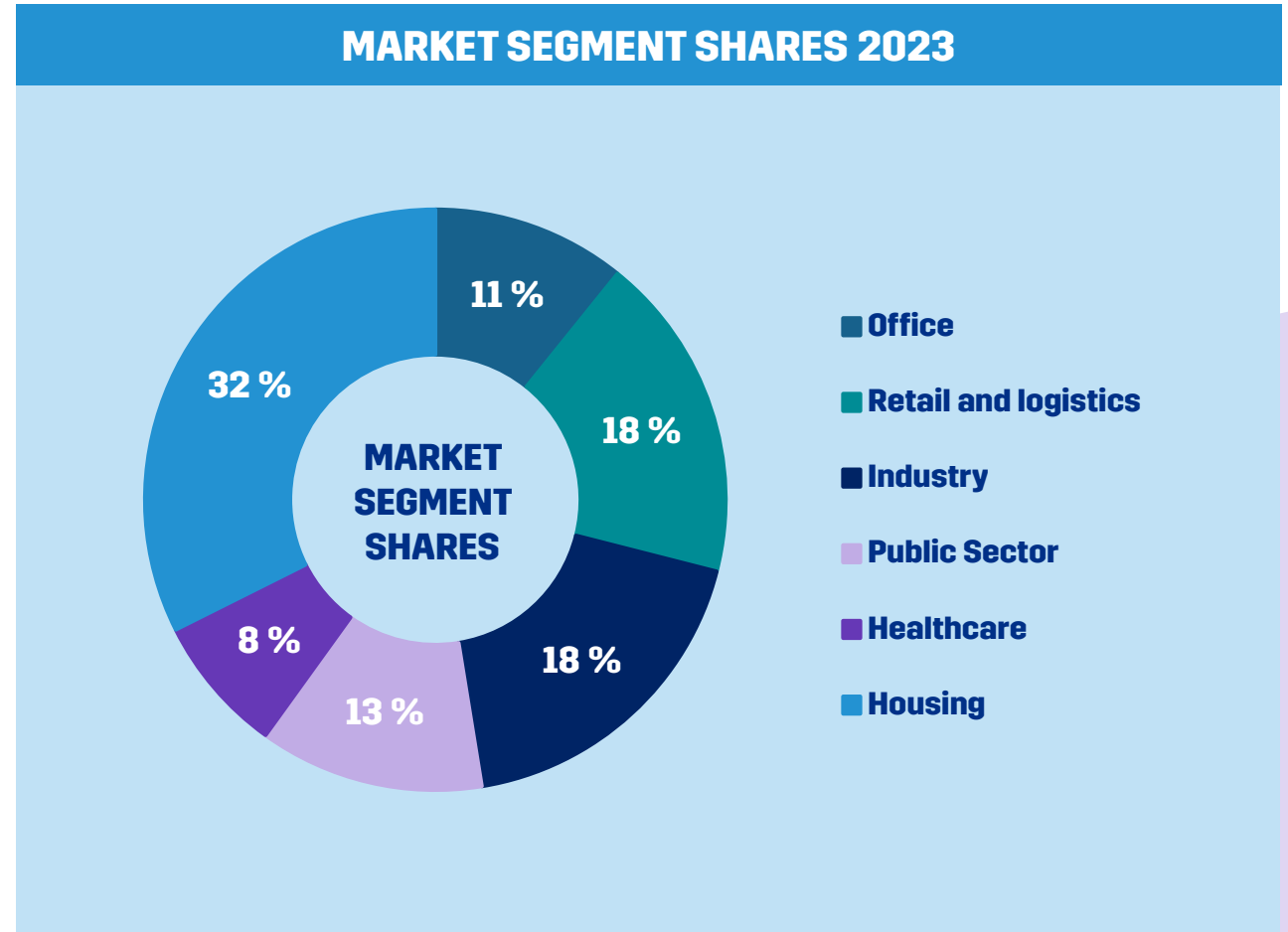


Illustrative image

■ 2021 ■ 2022



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Source: L&T management estimate

23 November 2023

A BROAD PRESENCE IN THE FACILITY SERVICES VALUE CHAIN

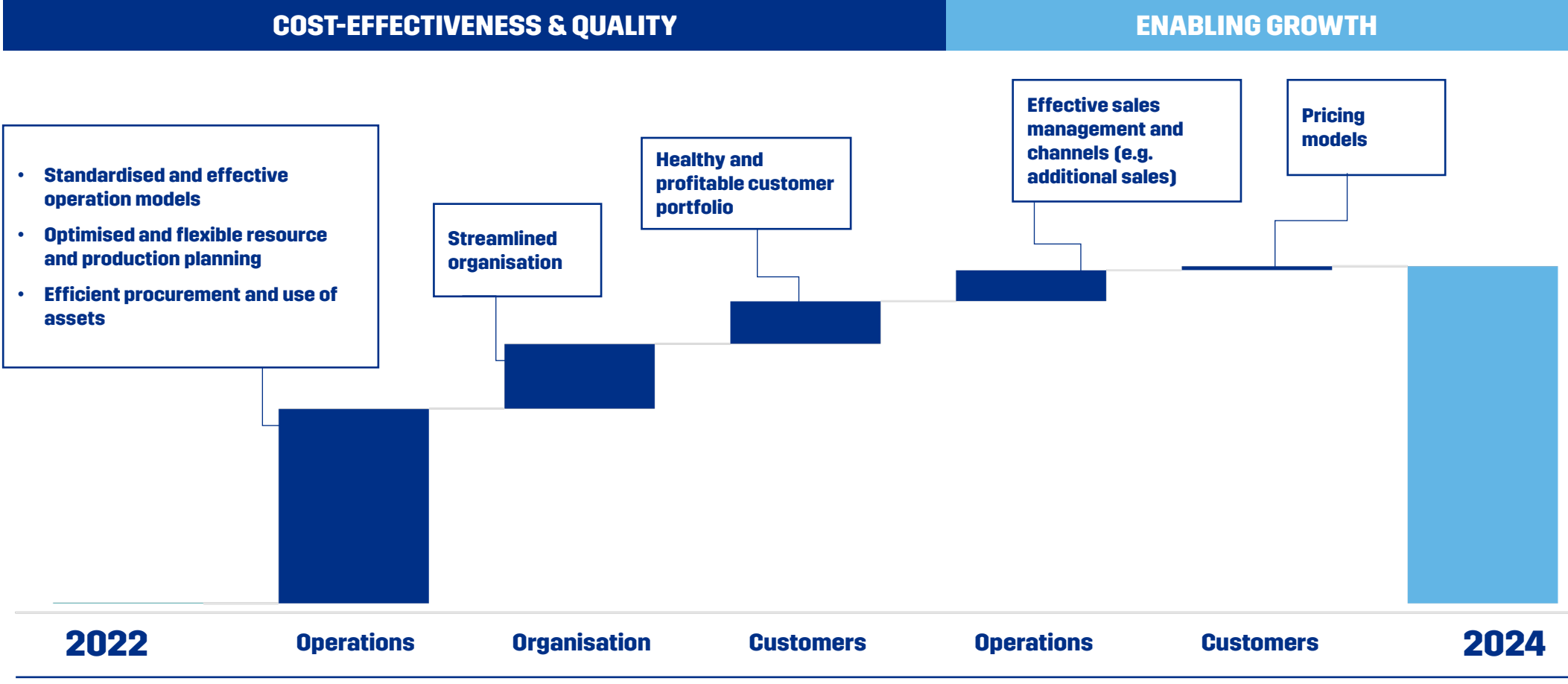


Sources: L&T management



TURNAROUND OF THE BUSINESS SUCCESSFUL IN 2023

ESTIMATED EBIT IMPACT OF TURNAROUND PROJECTS



Illustrative image



OPPORTUNITIES FOR CONTINUED ORGANIC GROWTH



WE DIFFERENTIATE BY

- Strong customer base and best in class sustainability
- Segment specific capabilities and knowledge
- Quality and reliability in demanding customer environments
- Frontrunner in deploying new digital solutions to improve end-user experience and customer profitability

OUR FUTURE POTENTIAL

PROPERTY MAINTENANCE & TECHNICAL SERVICES		CLEANING AND SUPPORT SERVICES	
	MULTISERVICE CONCEPTS		DATA-DRIVEN CLEANING: AUTOMATISATION AND ROBOTISATION OF CLEANING
ENERGY EFFICIENCY SERVICES TO EXISTING BUILDINGS MARKET		SUSTAINABLE CLEANING CONCEPTS	





**NEW SERVICE
CONCEPTS HELP
L&T STAND OUT
IN THE MARKET**



DATA-DRIVEN CLEANING FOCUSES EFFORTS ON THE RIGHT SPACES

How does data-driven cleaning work?

- L&T monitors the use of spaces in real time
- Sensors monitor waste bins, paper dispensers, etc.
- Spaces that are in use and in need of cleaning are maintained in good condition

Our customer



Our customer:

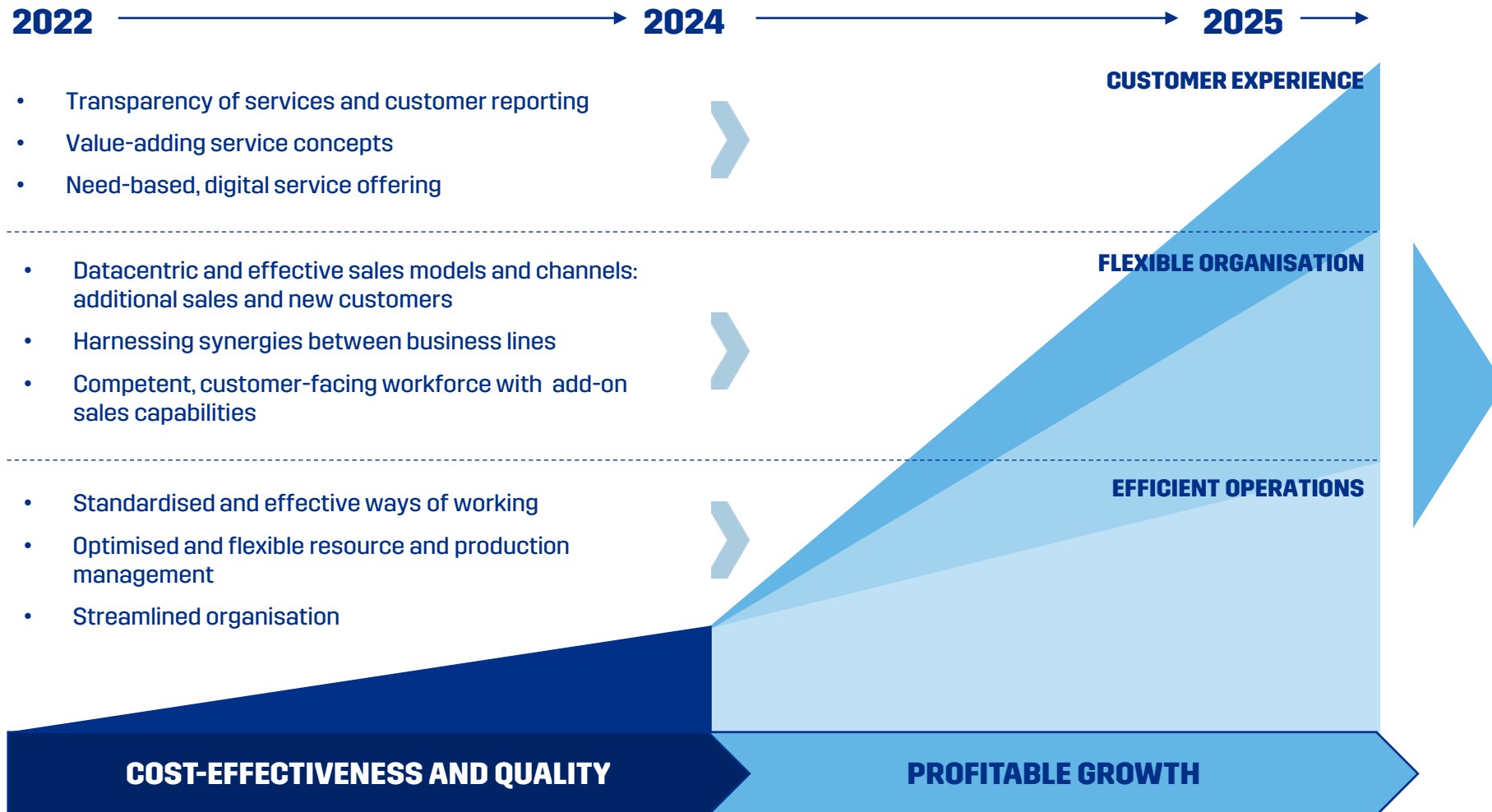
**MEYER
TURKU**



SOLID FOUNDATION FOR GROWTH



SUCCESSFUL PROFITABILITY IMPROVEMENTS FORM A HEALTHY FOUNDATION FOR GROWTH



TARGETS AND GROWTH AMBITION

- **Gain market leader position in chosen customer segments**
- **Achieve higher ROCE than main competitors**
- **Customer satisfaction and retention top of market**
- **Best in industry employee experience and retention**

Illustrative image



SUMMARY

VALUE CREATION AND NEW OPENINGS

DIGITAL SERVICES

- Customer reporting
- Utilising data & analytics
- Digital service and sales channels

SUSTAINABILITY

- Expanding energy management services
- Need-based, data-driven services
- Socially responsible

Cost-effectiveness

**Proven
track-record and
segment
competencies**

**Customer
satisfaction and
sales opportunities**

**Employee
satisfaction**

PROFITABLE BASE-BUSINESS



THANK YOU

