

The ASSA ABLOY Group is the global leader in access solutions. Every day we help people feel safe, secure and experience a more open world.

CMD 2022 – Strategy overview

Nico Delvaux, CEO and Erik Pieder, CFO

Experience a safer and more open world

Presentation outline



1

Overview & status update

ASSA ABLOY today

2

We are the market leader in a good industry

Trends create underlying strong demand

3

Our strategic framework

Accelerate profitable growth

4

Key takeaways

The market leader in an industry with strong fundamentals

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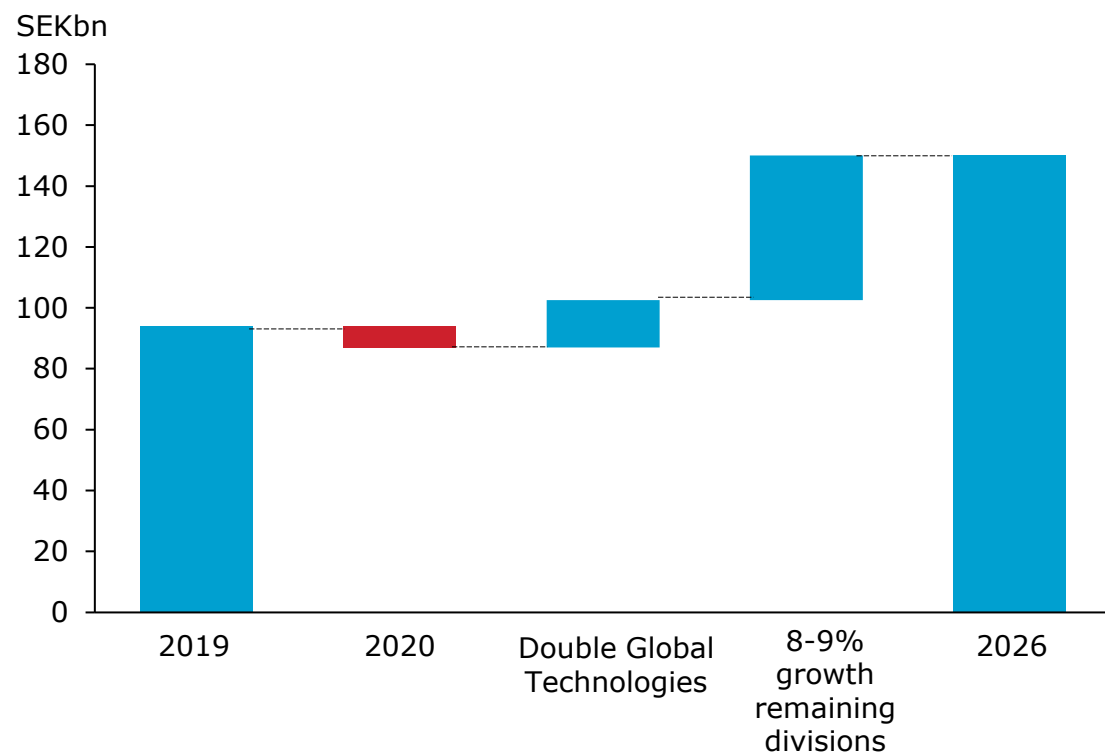
Key takeaways

The market leader in an industry with strong fundamentals

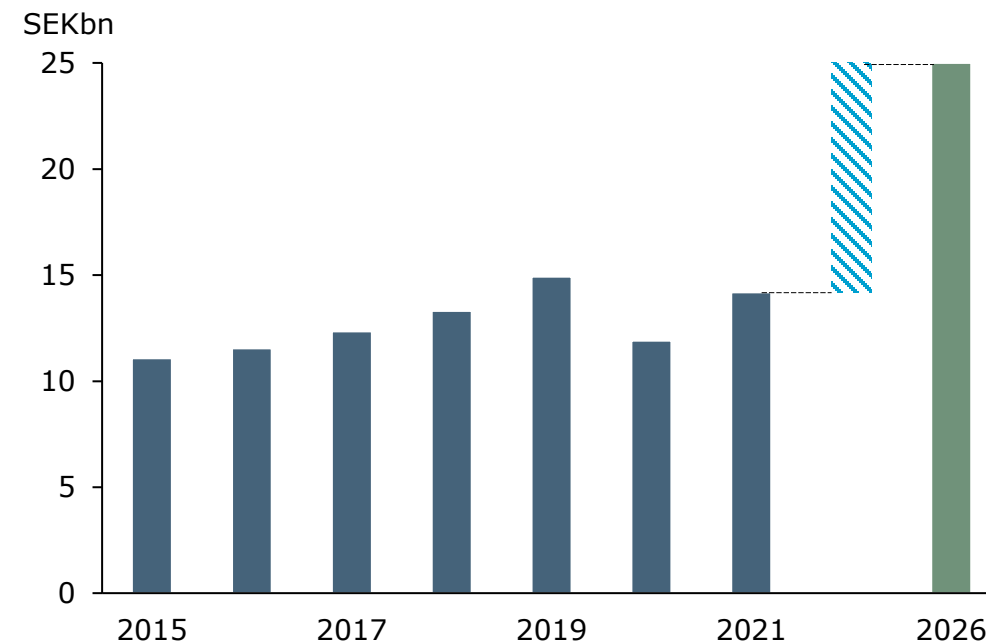
Recap of CMD 2021 – accelerate profitable growth

- assuming financial targets achieved

We can reach sales of SEK 150 bn...



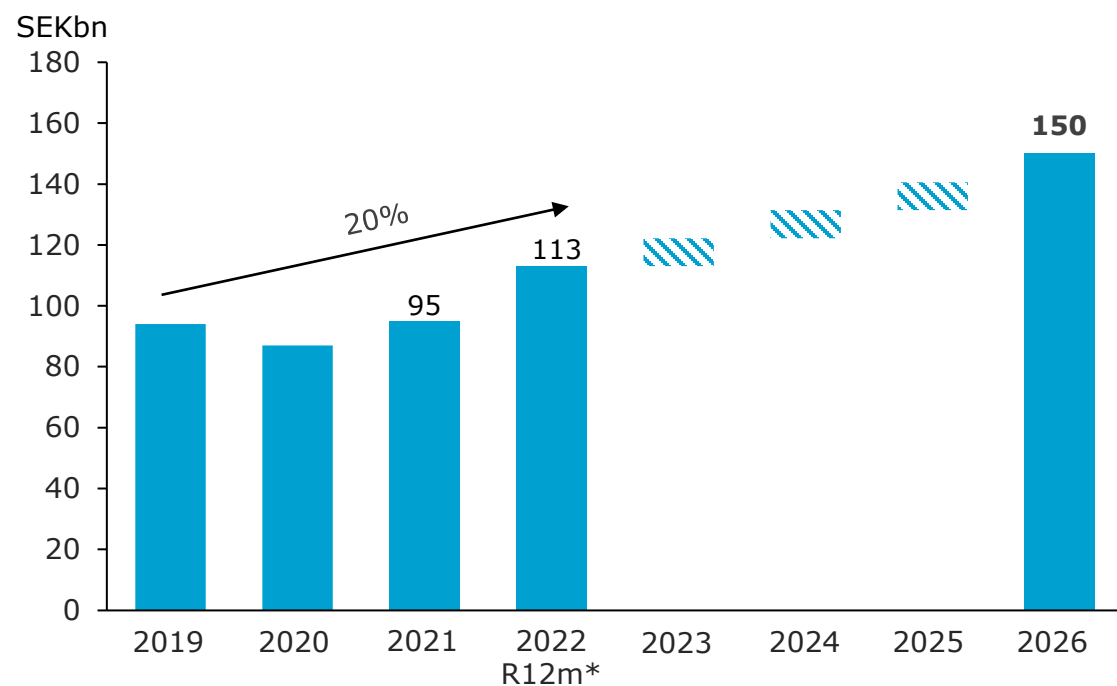
...and an operating profit of SEK 25bn in 2026



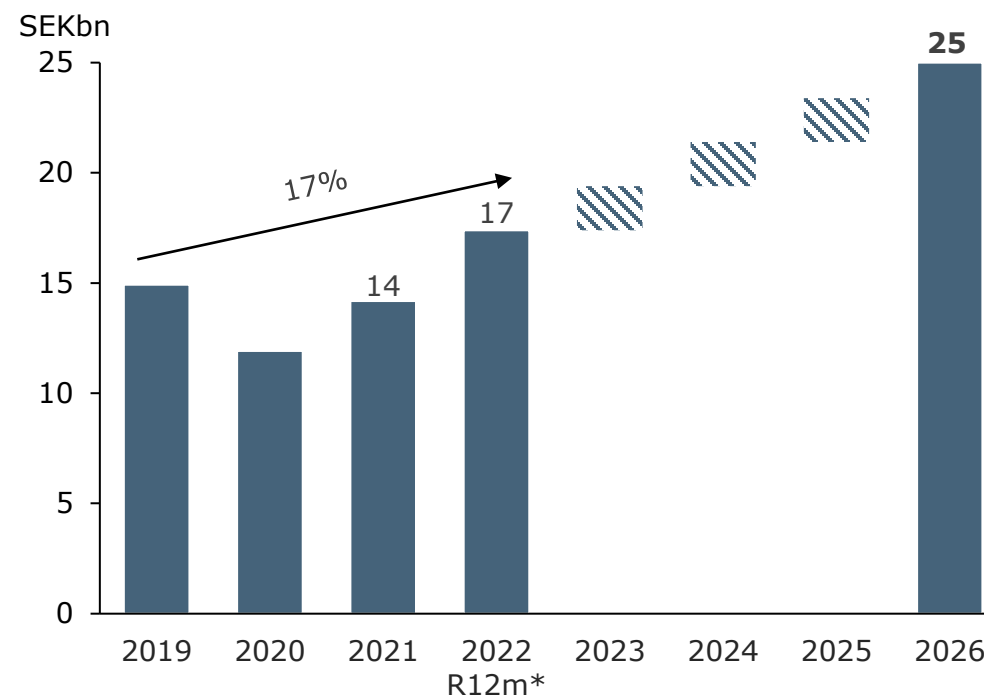
*) Excluding items affecting comparability.

Despite turbulent times, we are well on track

Sales have increased by 20% since base year 2019

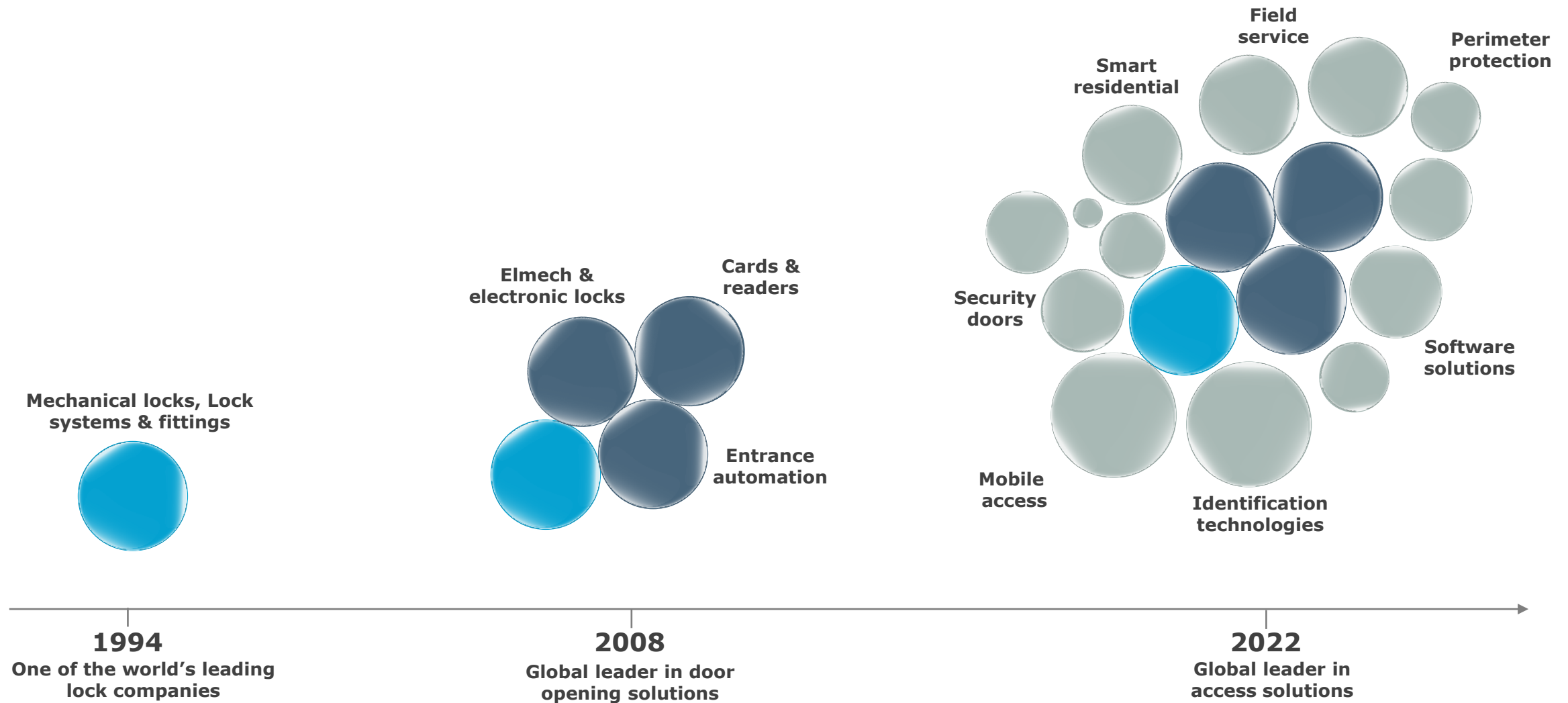


...and operating profit is up 17%



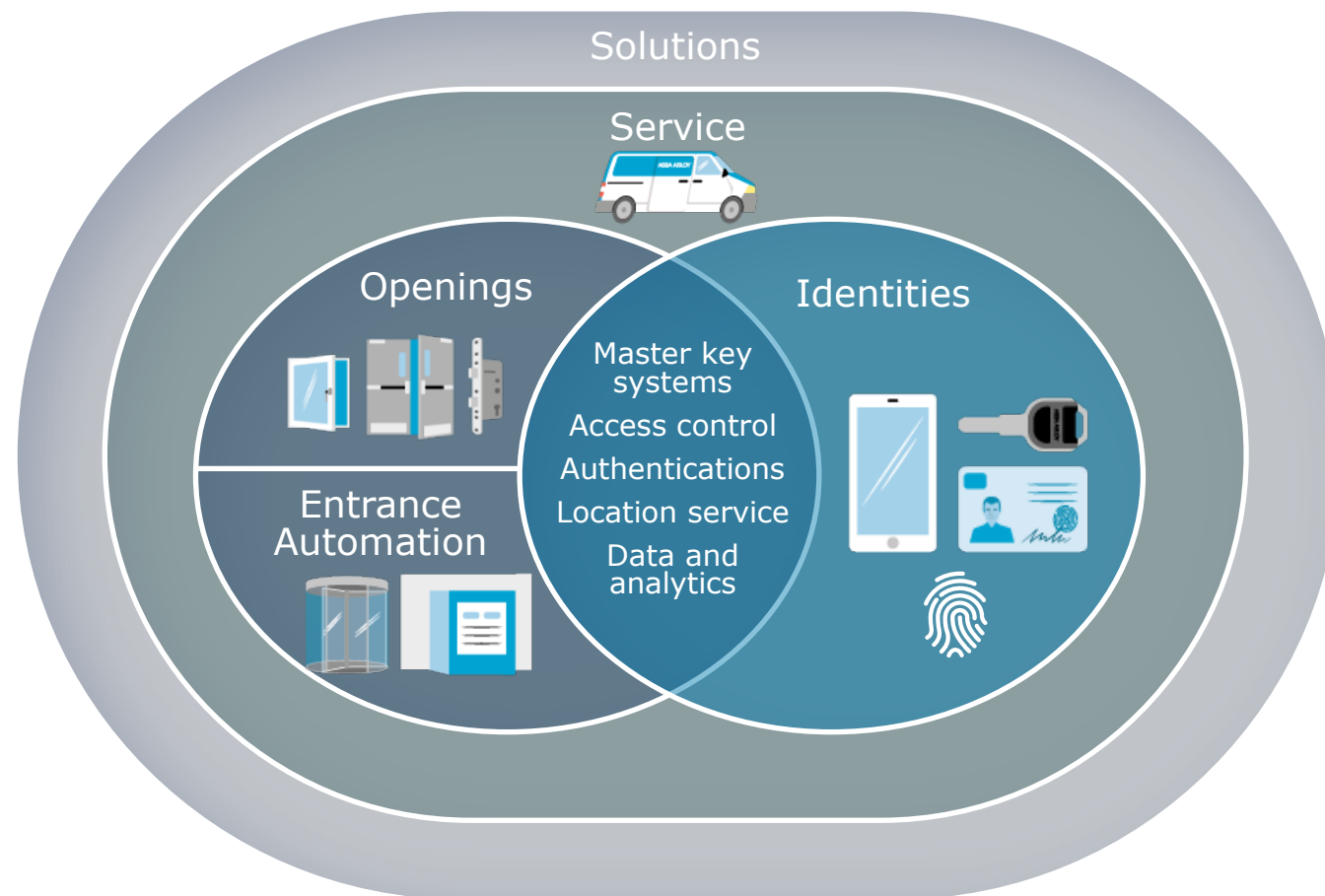
*) Note: As of 30 September

Evolution of the core



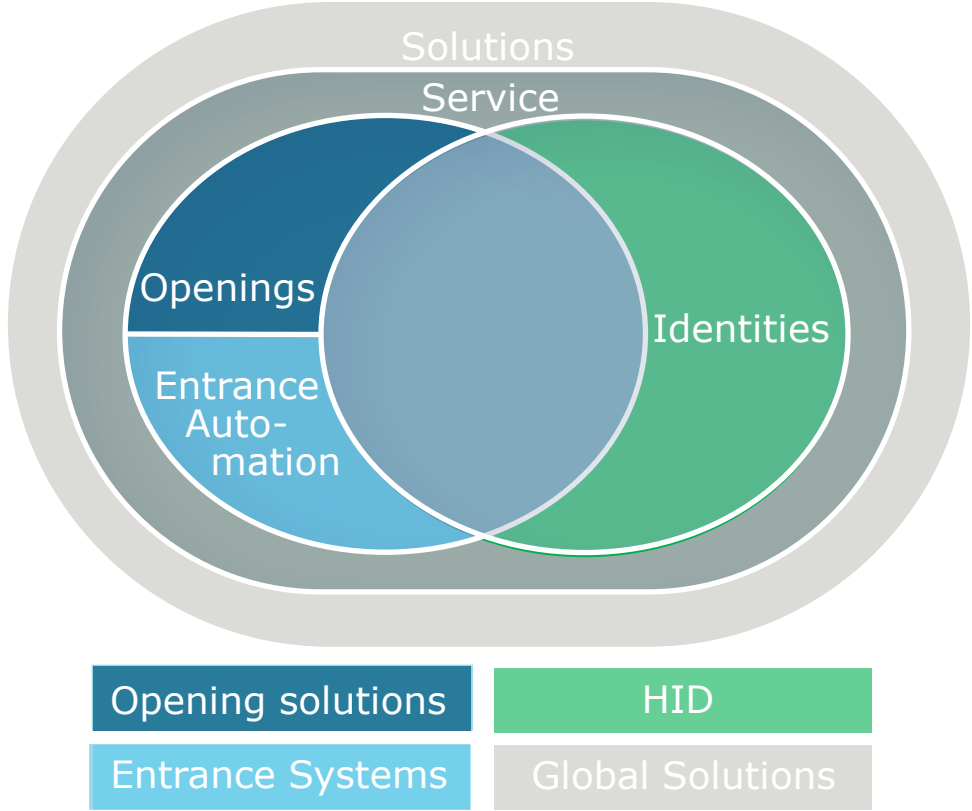
Our access solutions ecosystem

All parts of access solutions

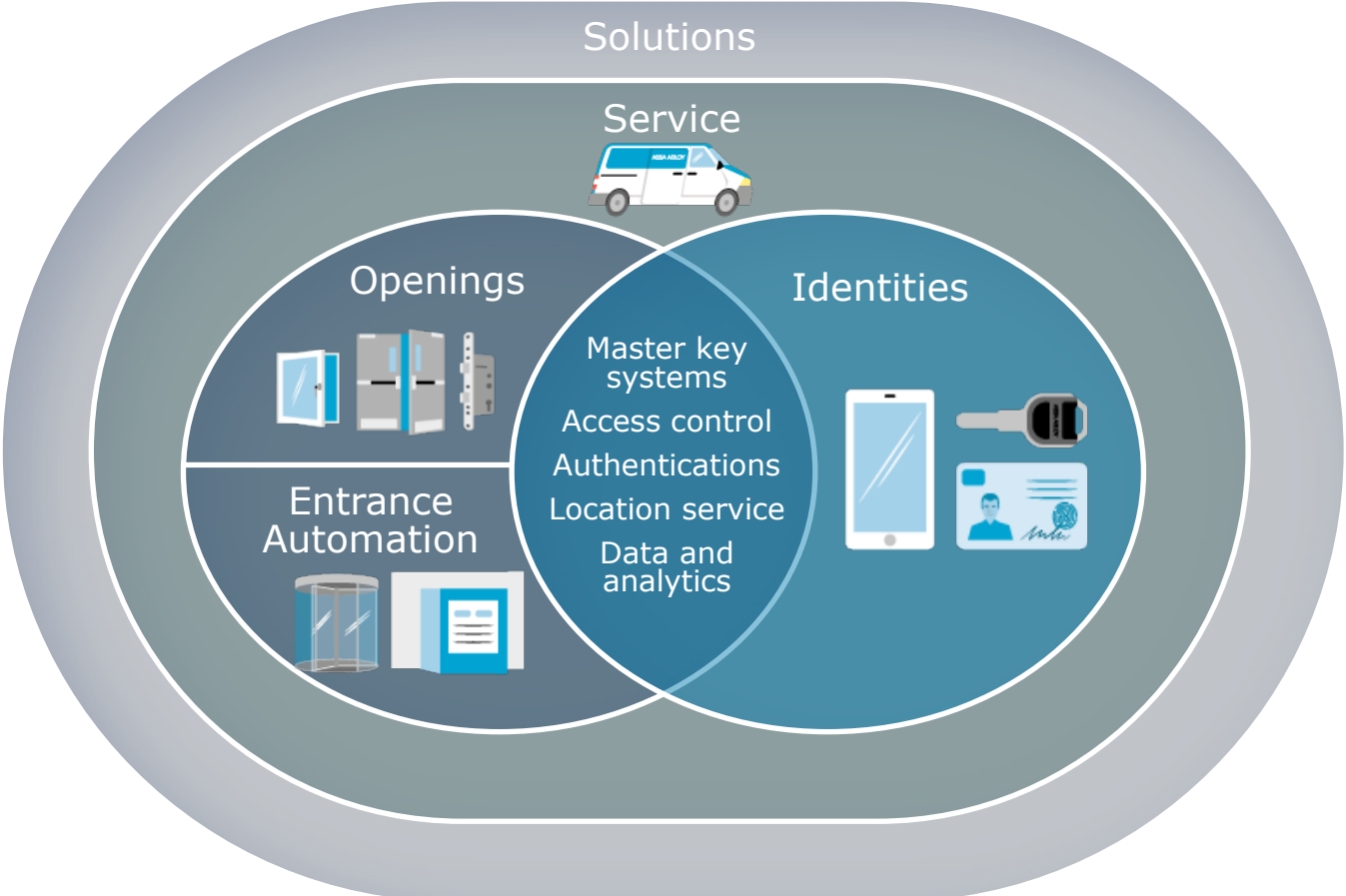


Our access solutions ecosystem

Divisional core

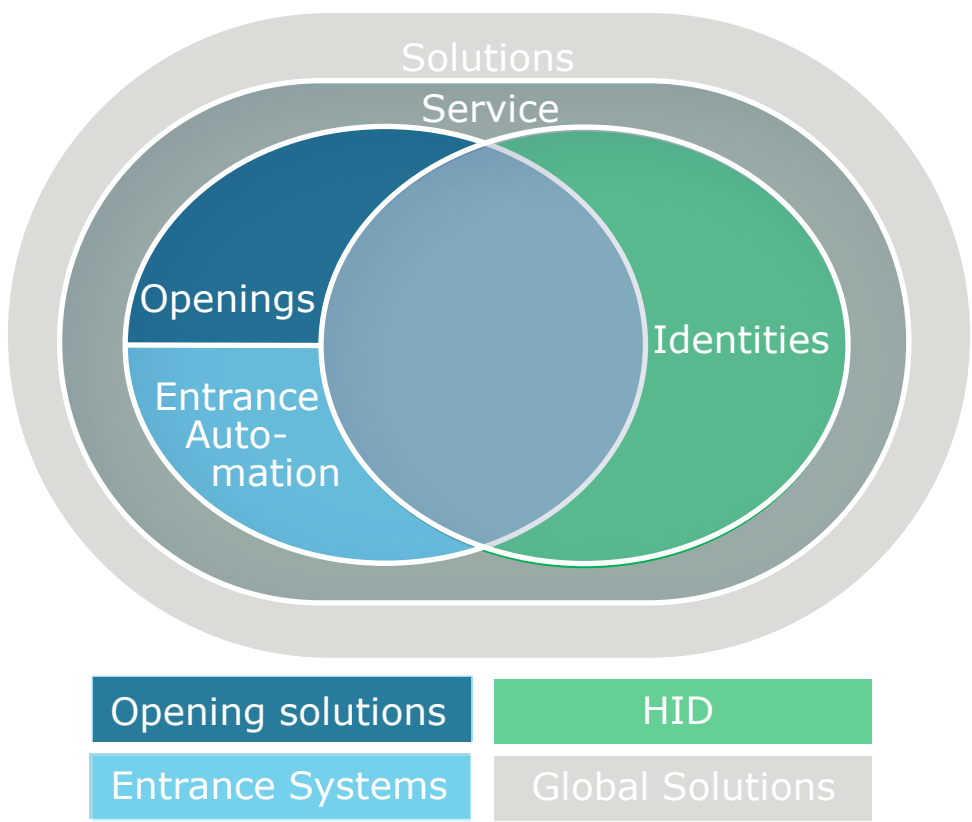


All parts of access solutions

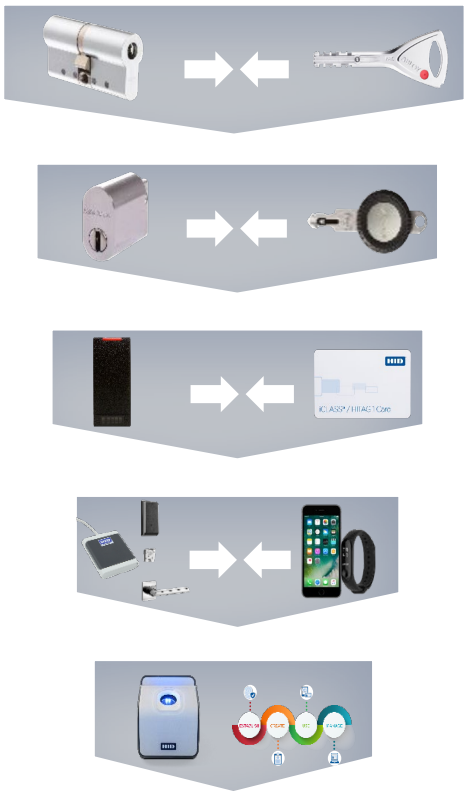


Our access solutions ecosystem

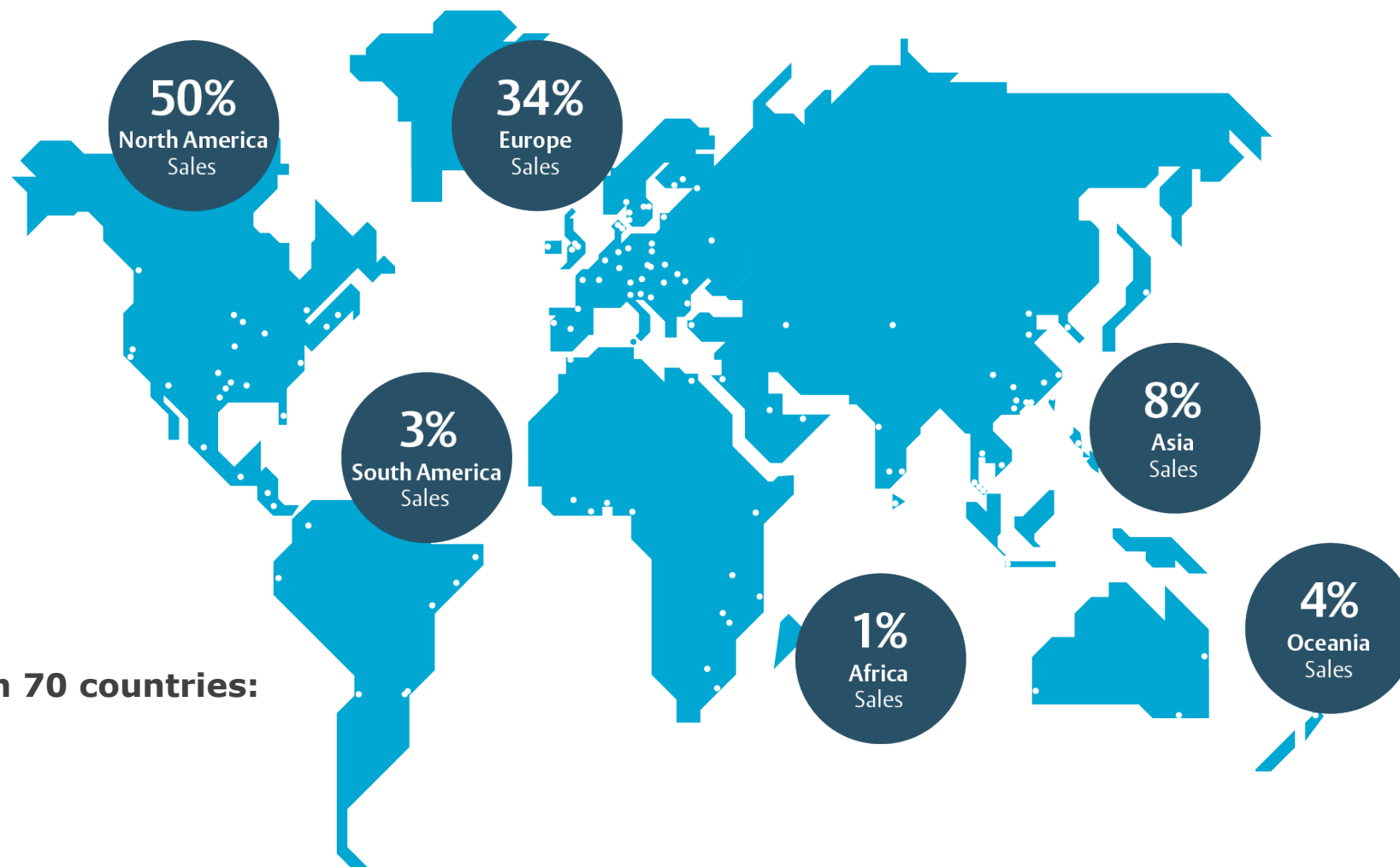
Divisional core



Convergence



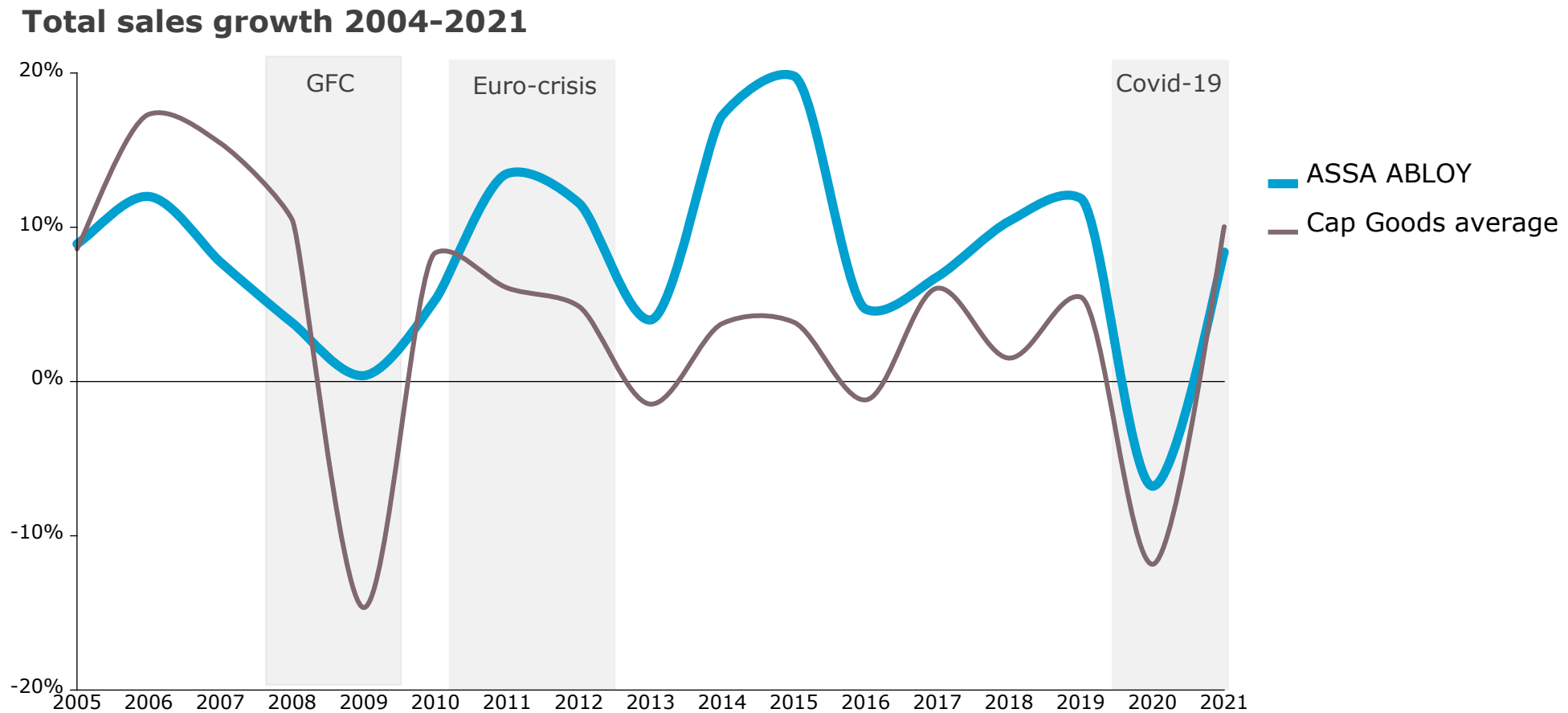
We are truly global and uniquely local



Operations in more than 70 countries:

- >1,000 sites
- >100 R&D centres
- ~ 130 production facilities

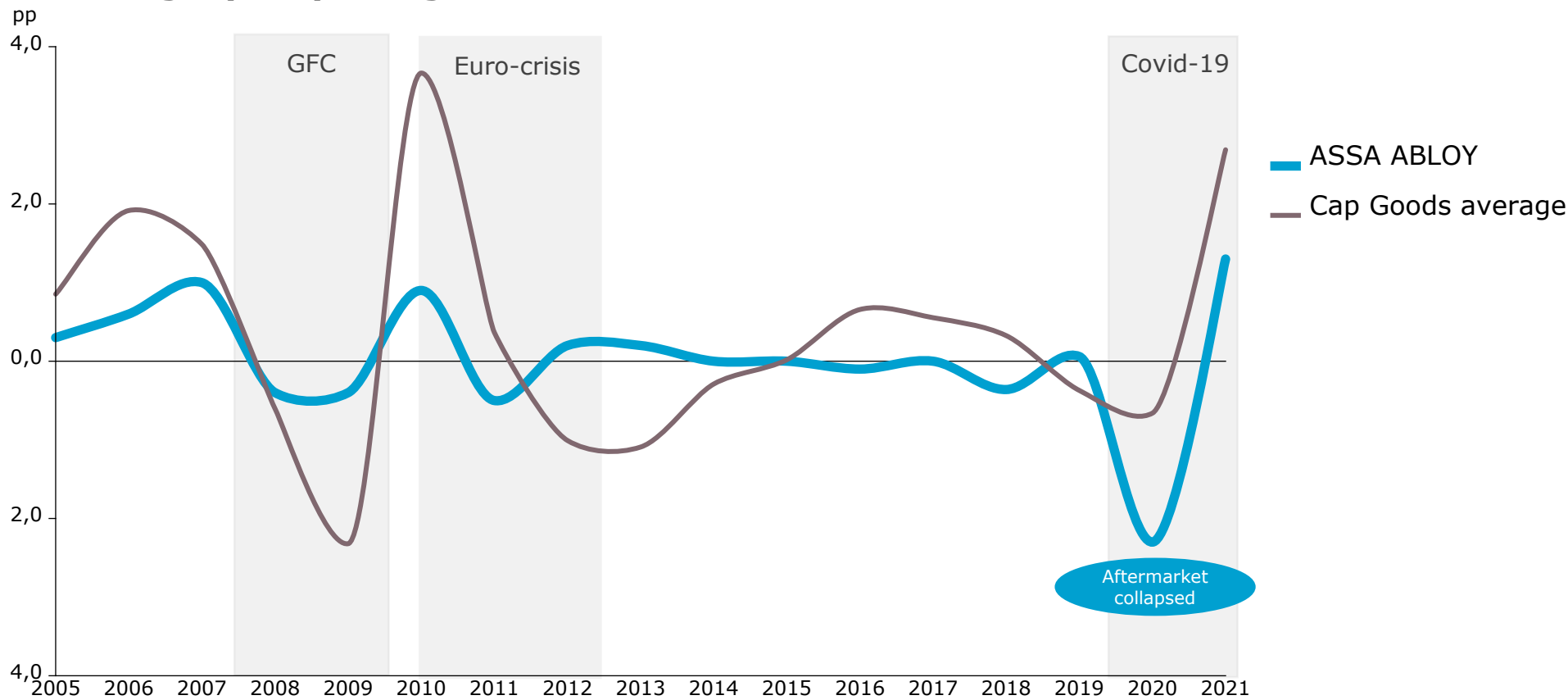
Our business model has proven more resilient during economic downturns



Note: The Cap Goods average consists of 9 European capital goods companies

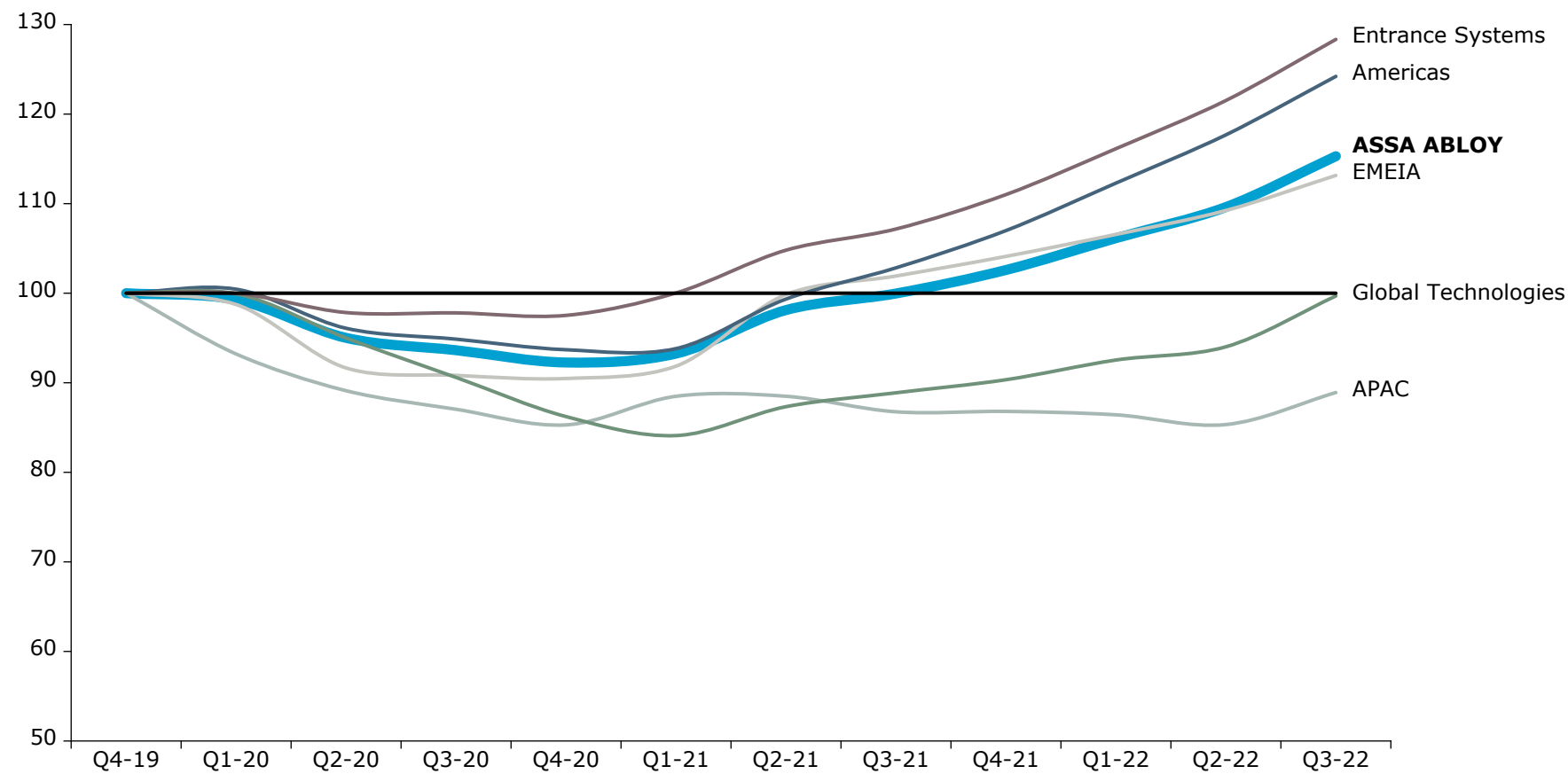
Our business model has proven more resilient during economic downturns

EBIT margin yearly change 2005-2021



Note: The Cap Goods average consists of 9 European capital goods companies. ASSA ABLOY's EBIT-margin excludes China write-downs, MFP and positive revaluation of agta record

Three out of five divisions are back and above pre-pandemic levels



*) Note: FX-adjusted and restated (excl. M&A) sales on a R12M-basis. Sales Q4 2019 = Index 100

EMEIA

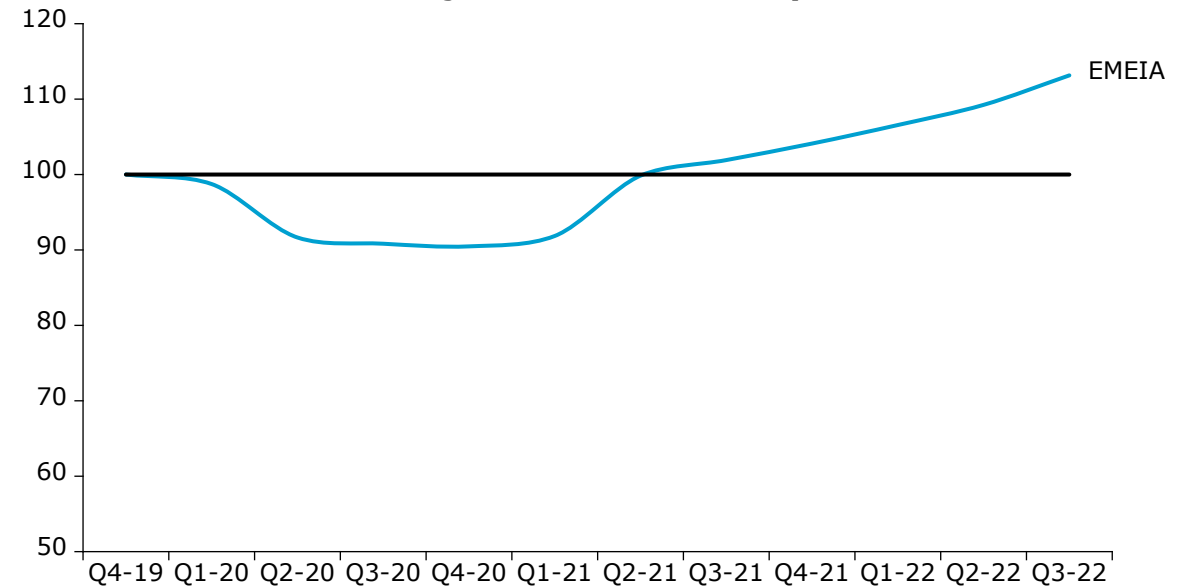
Market performance

- Weaker residential demand in certain markets
- Emerging markets growing strongly
- Higher inflation
- More volatile market conditions

What we are most excited about

- Continued shift to electromechanical and digital
- Opportunities with cloud-based solutions
- Green building standards opening new possibilities

EMEIA FX-adjusted sales development¹



^{*)} Note: FX-adjusted and restated (excl. M&A) sales on a R12M-basis. R12M Sales Q4 2019 = Index 100

Americas

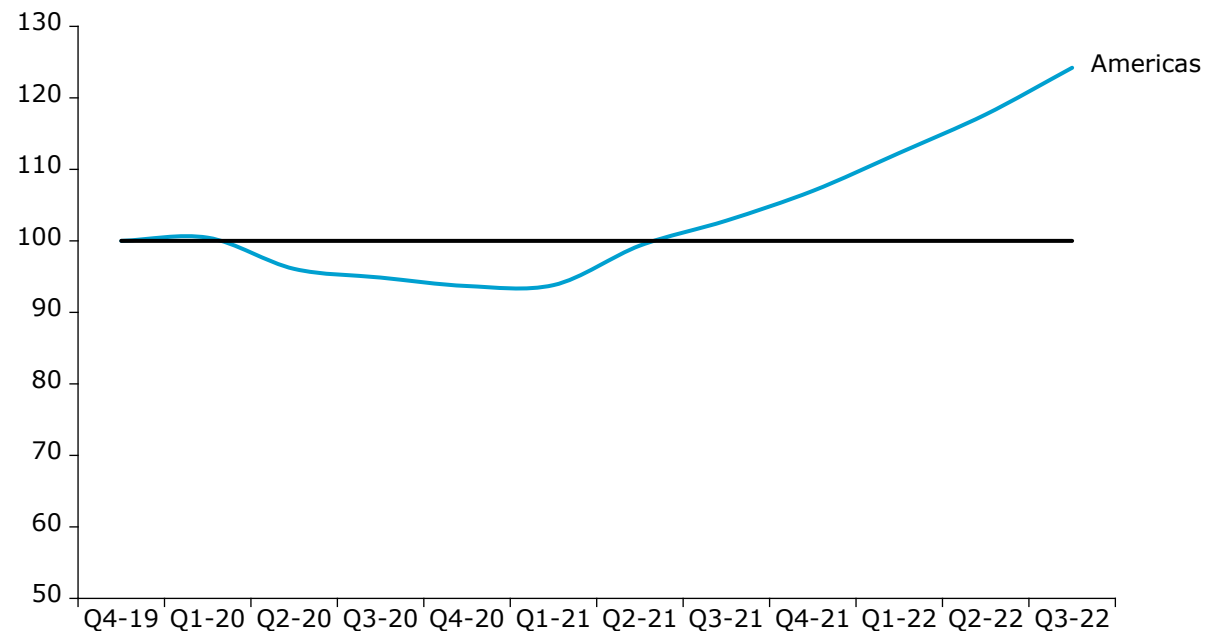
Market performance

- Strong non-residential activity level in the US
- Good residential activity level in the US
- Normalized growth in Latin America
- Higher inflation

What we are most excited about

- Software/hardware bundling
- eCommerce delivery
- HHI

Americas FX-adjusted sales development¹



^{*)} Note: FX-adjusted and restated (excl. M&A) sales on a R12M-basis. R12M Sales Q4 2019 = Index 100

APAC

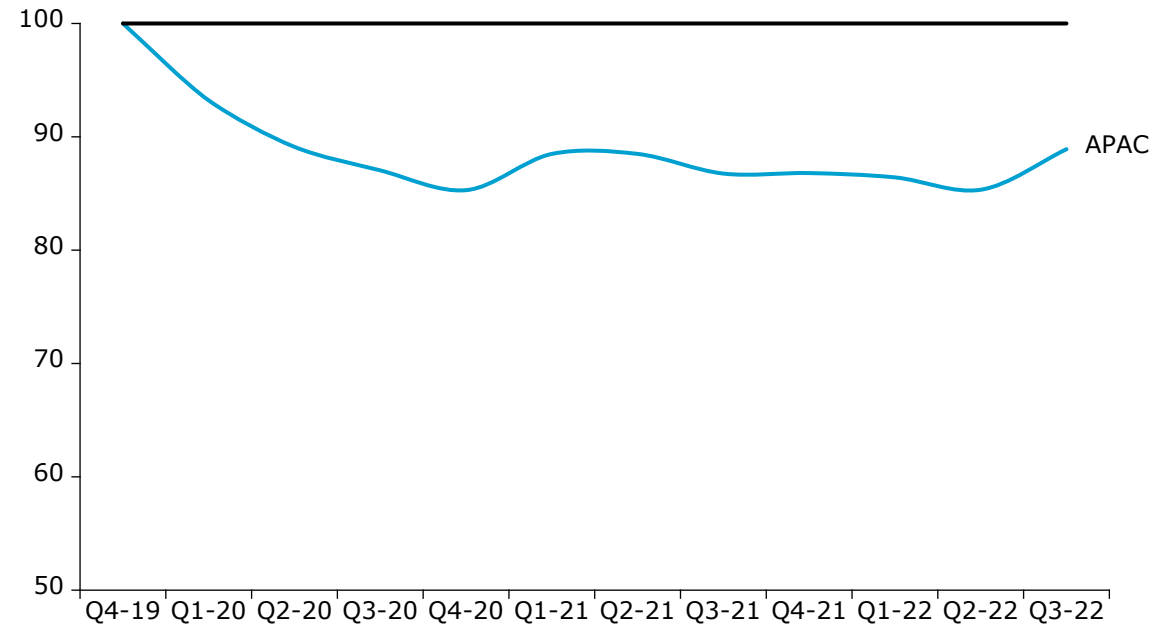
Market performance

- China construction market continues to decline
- Solid activity in Pacific
- Recovery in South East Asian markets
- Smart residential is gaining traction in Pacific

What we are most excited about

- Product pipeline in smart residential
- Commercial opportunities in China
- Recent acquisitions

APAC FX-adjusted sales development¹



^{*)} Note: FX-adjusted and restated (excl. M&A) sales on a R12M-basis. R12M Sales Q4 2019 = Index 100

Global Technologies

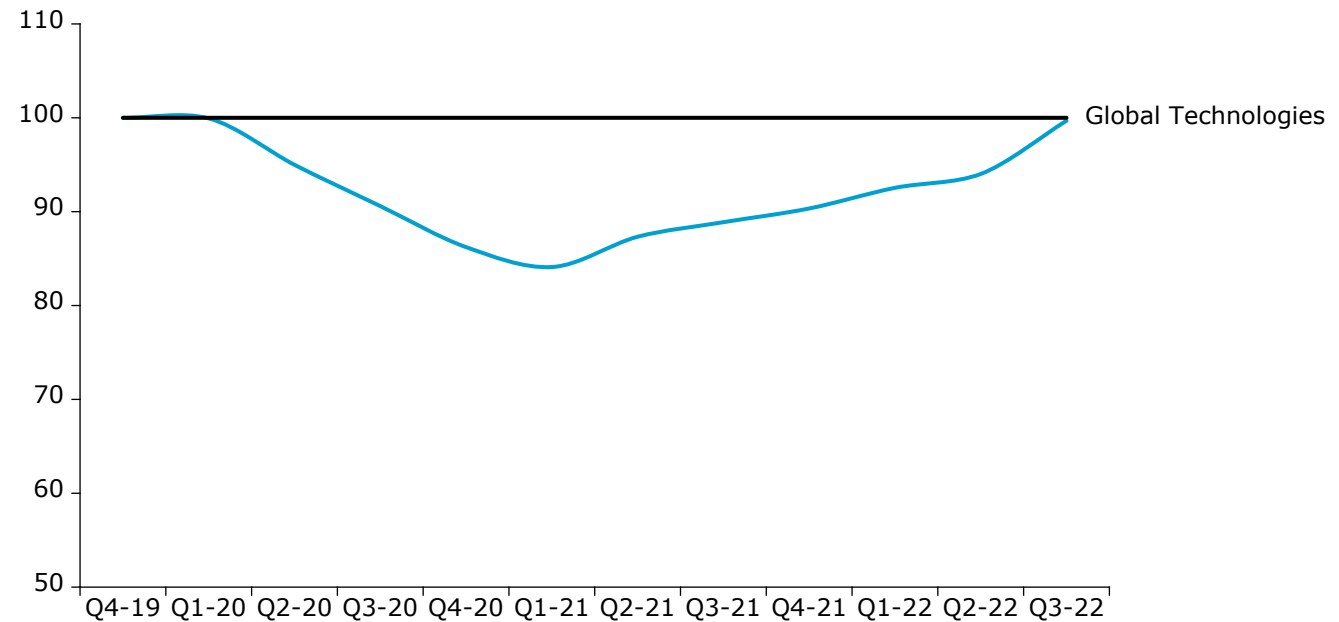
Market performance

- Mobility back to pre-pandemic levels
- Hospitality and Citizen ID not back yet
- Component shortages pressure is easing

What we are most excited about

- The shift from mechanical to electromechanical and digital
- Lead the shift to mobile
- Our solution provisioning in our new verticals

Global Technologies FX-adjusted sales development¹



^{*)} Note: FX-adjusted and restated (excl. M&A) sales on a R12M-basis. R12M Sales Q4 2019 = Index 100

Entrance Systems

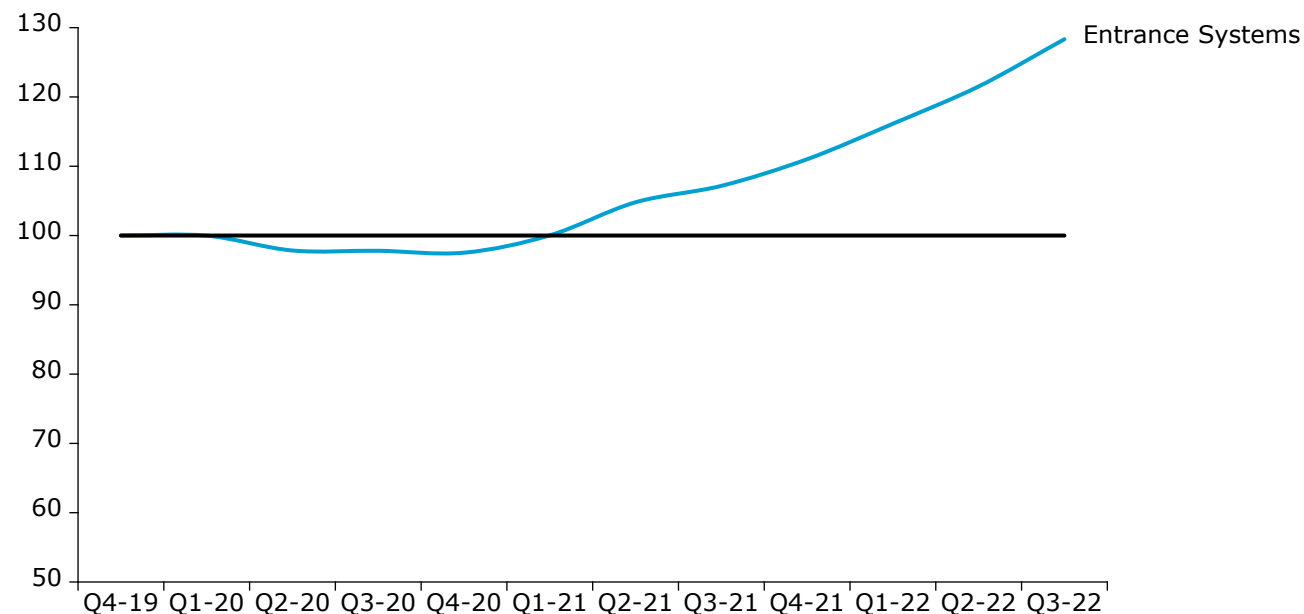
Market performance

- Continued positive market environment in North America
- Higher inflation

What we are most excited about

- Service growth
- Recent acquisitions
- Many efficiency opportunities still to be captured

Entrance Systems FX-adjusted sales development¹



^{*)} Note: FX-adjusted and restated (excl. M&A) sales on a R12M-basis. R12M Sales Q4 2019 = Index 100

Presentation outline



Overview & status update

ASSA ABLOY today



We are the market leader in a good industry

Trends create underlying strong demand



Our strategic framework

Accelerate profitable growth



Key takeaways

The market leader in an industry with strong fundamentals

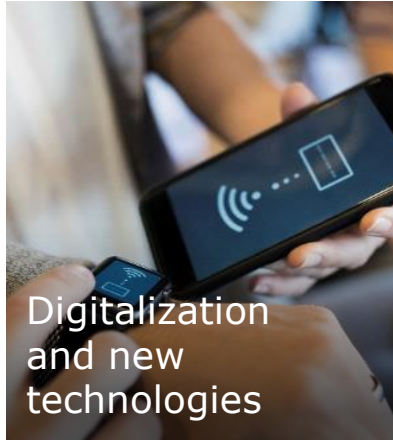
We are part of a good industry



Increased demand for safety and security



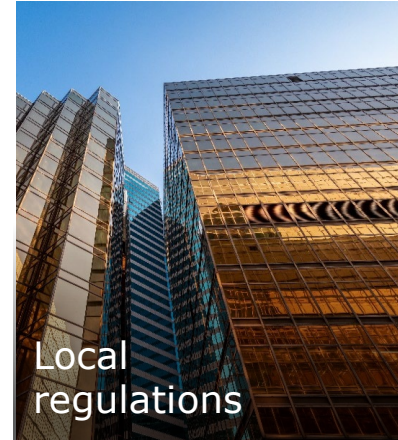
Movement of people & demographic change



Digitalization and new technologies



Sustainability



Local regulations



**Trends create
underlying strong
demand**

We are part of a good industry



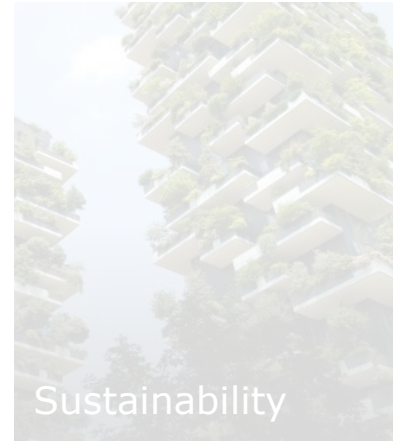
Increased demand for safety and security



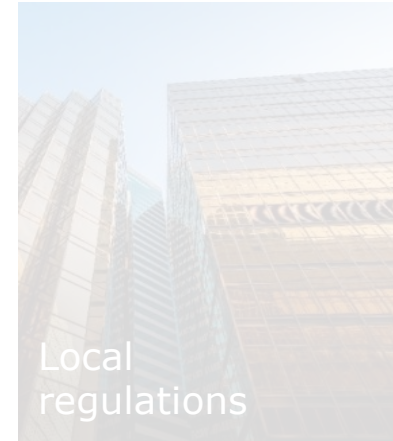
Movement of people & demographic change



Digitalization and new technologies



Sustainability

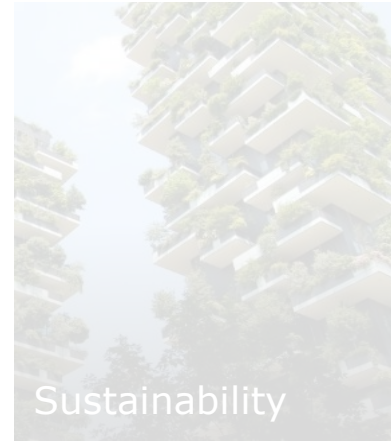
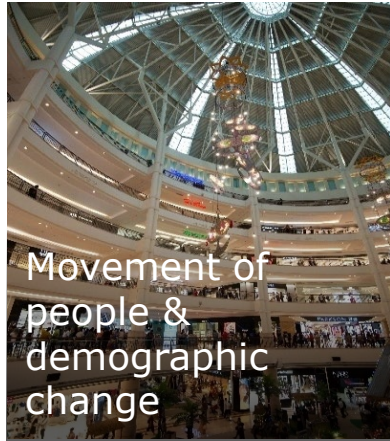


Local regulations

- In a world with a high perception of uncertainty, the demand for safety and security is increasing
- Drivers include
 - Robustness, resilience and reliability
 - Extreme weather protection
 - Pandemic safe & touchless
 - Terror, active shooters and riots

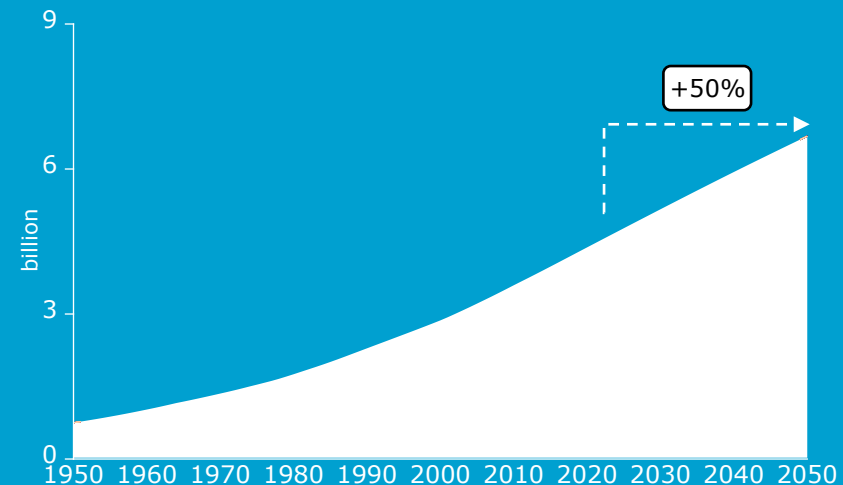


We are part of a good industry

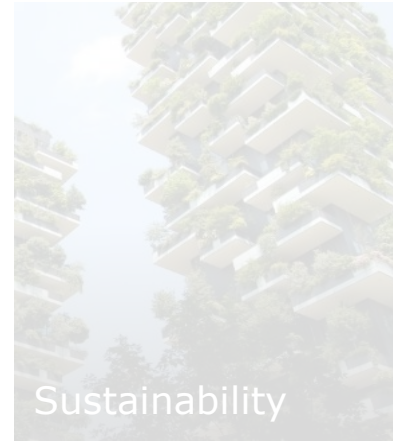
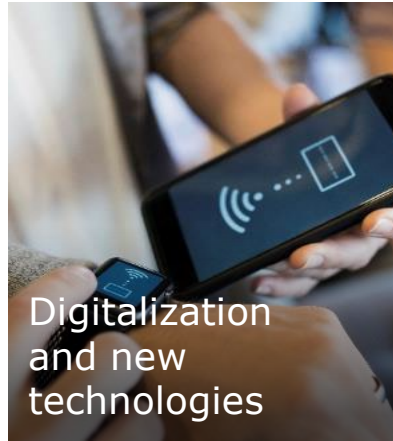


- Movement of people and demographic change create demand for buildings and access solutions
 - Urbanization in emerging markets
 - De-urbanization in certain developed markets
 - Megacities & smart cities
 - Migration
 - An ageing population
 - Millennials

Urban population is projected to grow ~50% until 2050



We are part of a good industry



New technologies and digitalization

Connectivity
& IoT

Touchless

Biometrics

Mobile



Opportunities from new business models

Shared
economy

Everything
as a service

Ecosystems

Cloud

We are part of a good industry



Demand

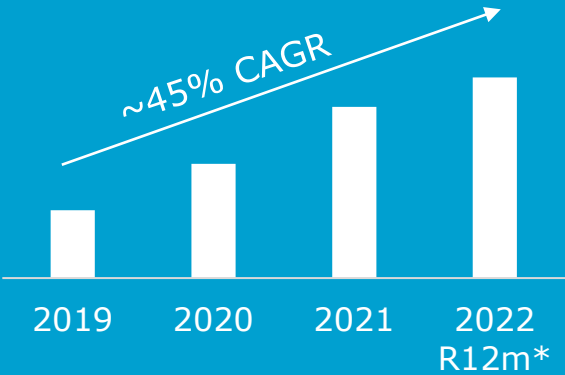
Customers are increasingly looking for sustainable solutions

Regulation

Regulation is increasing for more energy-efficient buildings and access solutions

Accelerated demand for green buildings and access systems

EMEIA: Green specifications (order value)



*As of 30 September 2022

Demand for green specification growing

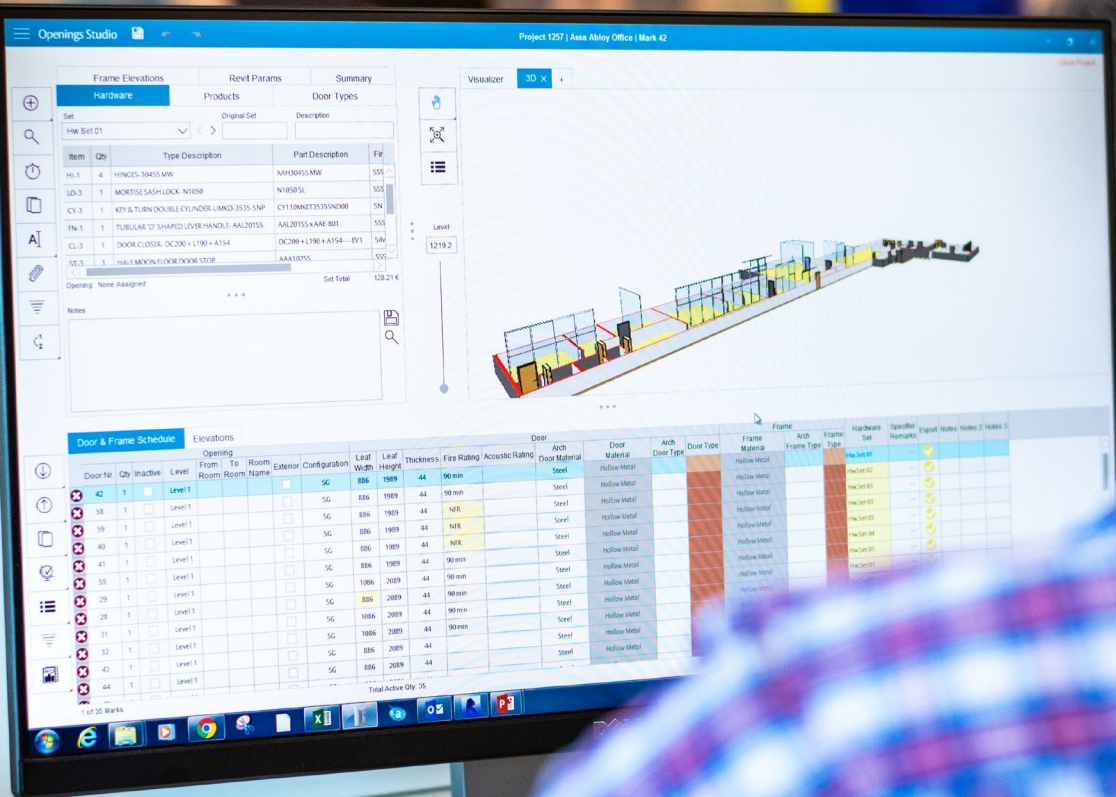
- Dedicated team of close to 200 specialists in EMEIA
- Specification projects increase by 150% in last two years
- Value of green openings up to 25% higher
- Developed process and methodologies for our products to support growing demand



We use Openings Studio for green specifications

Openings Studio

- State-of-the-art BIM enabled information sharing solution
- Creates and visualizes openings
- Enables customisation of access solutions and green building requirements
- Provides seamless updates and changes to projects



ASSA ABLOY Middle East

Cleveland Oncology Clinic, Abu Dhabi, UAE



€1.1m
Gross Value

600
Doors

2022
Completion

Client: Cleveland Clinic
Contractor: Dutco Construction Co.
Solution: Metal & Wooden Doors, ANSI hardware, Automatic Operators, Aperio.

Openings Studio® 3D



Environmental Product Declarations provided for our products

Cleveland Clinic Abu Dhabi
Brought to you by Multidata

ASSA ABLOY

ASSA ABLOY Poland

Global Office Park, Katowice



€543k
Contract Value

618
Doors

2022
Completion

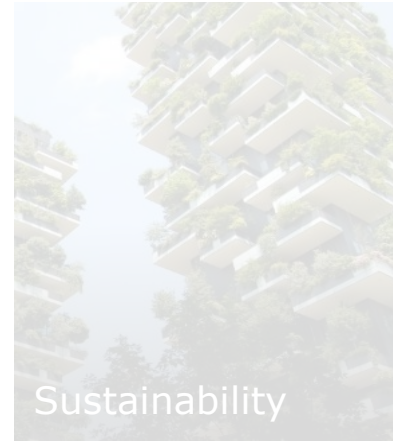
Client: Cavatina GW Sp. z o.o.
Resi Capital S.A.
Contractor: Cavatina Holding S.A.
Solution: ABLOY elmech locks

Openings Studio® 2D

Environmental Product Declarations provided for our products

We are part of a good industry

EMEIA product display



- Local markets' regulations, standards and requirements are constantly changing and are often different from market to market
- This creates
 - Local entry barriers
 - Demand for upgrading to compliant access solutions
 - Strong local customer relations

Examples of cylinder profiles



CY110



CYS10



Where we are the clear market leader

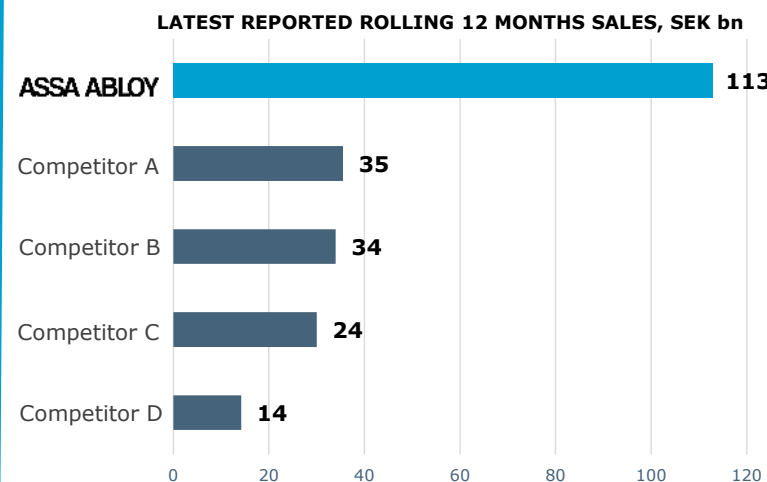
1

Strong brands and channel position



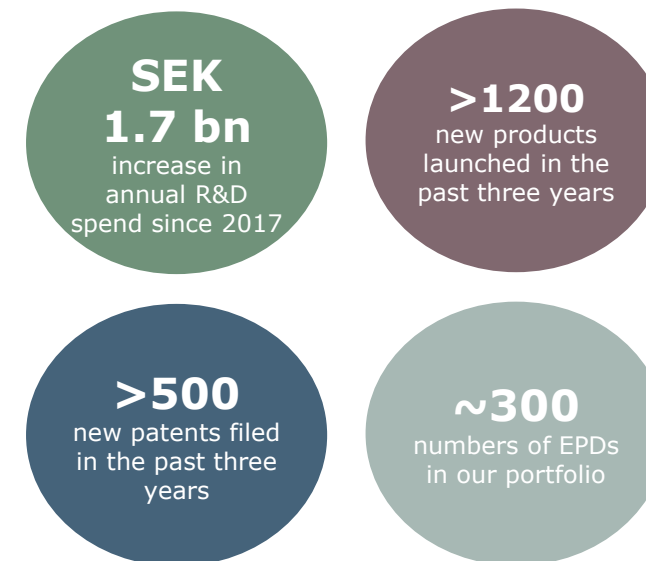
2

Largest installed base and product offering



3

Leading innovation



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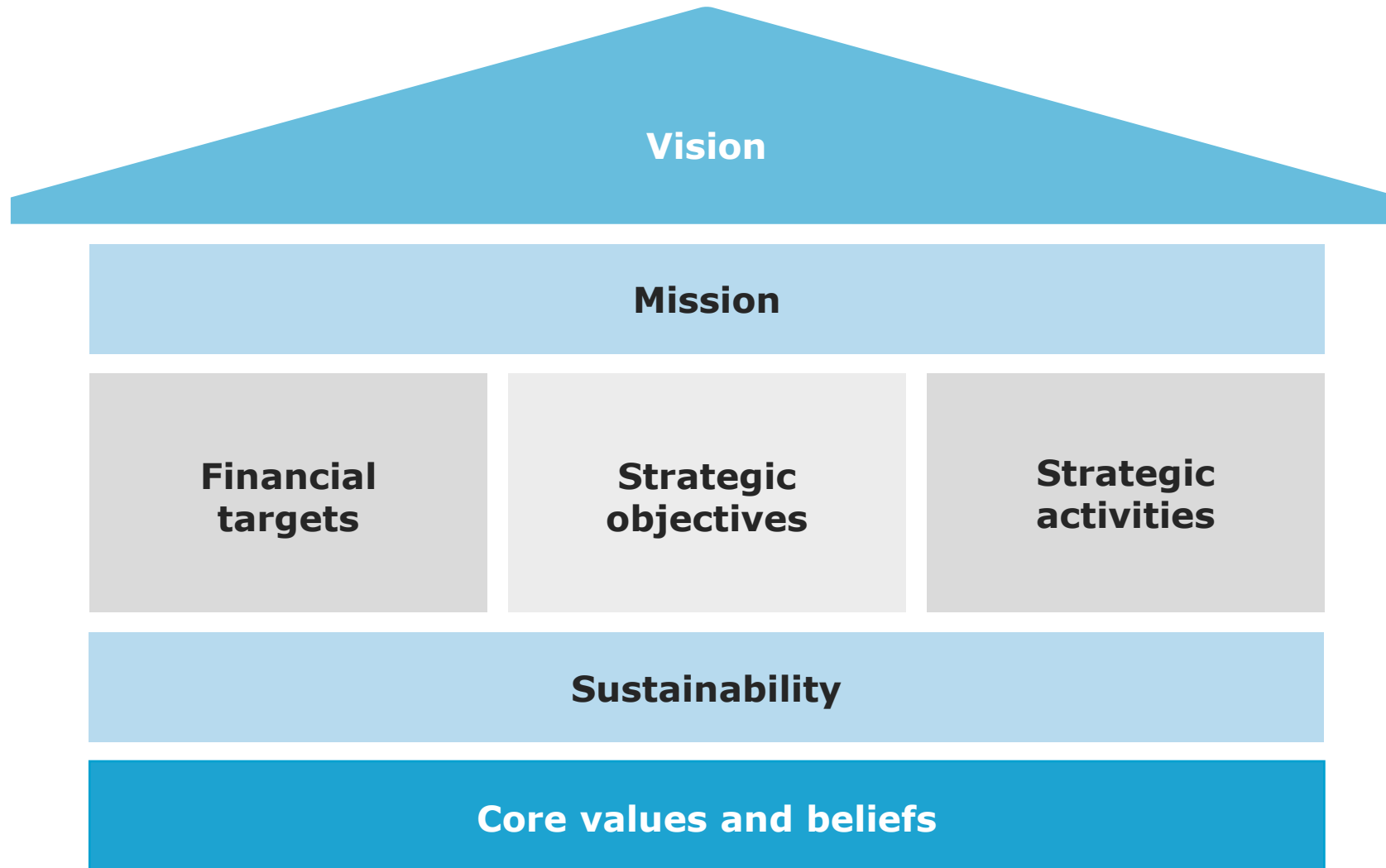
Accelerate profitable growth

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Key takeaways

The market leader in an industry with strong fundamentals

Our strategic framework



Experience a safer and more open world



Vision

To be the global leader in providing innovative access solutions that help people feel safe and secure so that they can experience a more open world



Mission

- Build sustainable shareholder value
- Provide added value to our customers, partners and end-users
- Be a world-leading organization where people succeed
- Conduct business in an ethical, compliant and sustainable way



Core values and beliefs

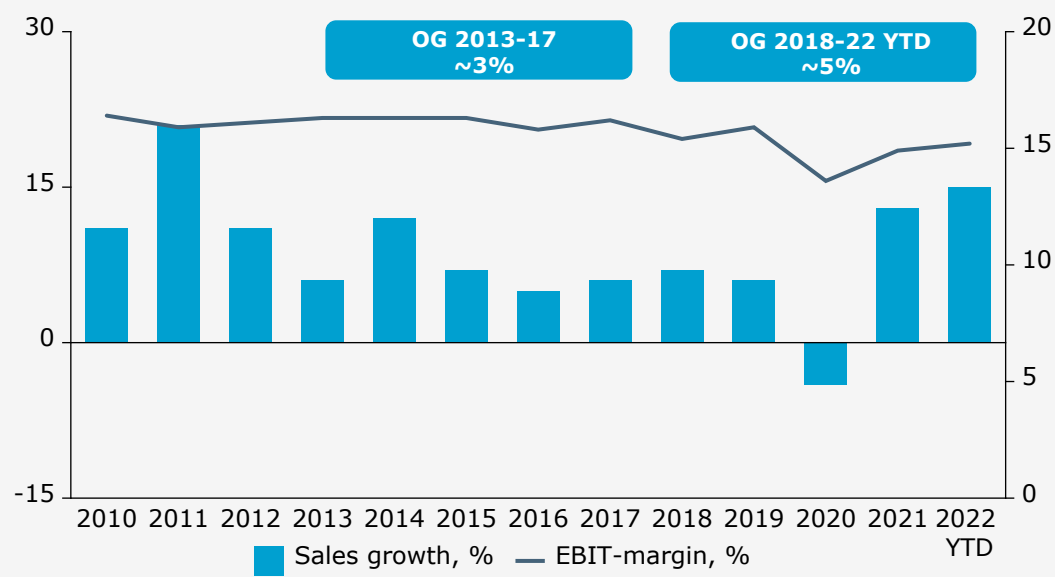
- Empowerment – *We have trust in people*
- Innovation – *We have the courage to change*
- Integrity – *We stand up for what is right*



Financial targets are ambitious but achievable



Historical performance



9.2%
Average sales growth
p.a. 2010-19

16.1%
EBIT-margin average
2010-19

Financial targets

10%
sales growth
per annum over
a business
cycle

16-17%
EBIT-margin over a
business cycle

Strategic objectives



Growth through customer relevance



We believe that continued profitable growth starts with understanding our customers.

Product leadership through innovation



Innovation is an enabler for everything we do and is the most important driver for our organic growth.

Cost-efficiency in everything we do



Realized savings from improved efficiency can be invested in innovation and activities that accelerate our growth.

Evolution through people



Developing our people is how we secure our future success and growth.



Growth through customer relevance

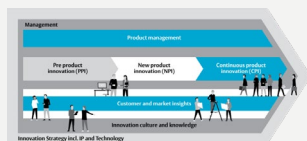




Product leadership through innovation



Innovation system



Product management



Intellectual property



Product quality, safety and security



Design to value



Sustainability



Digital factory





Product leadership through innovation

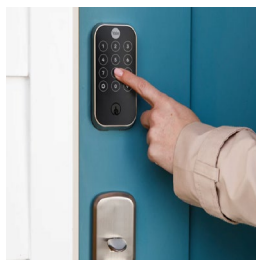


We transform customer needs into organic growth

- Megatrends accelerate market shifts and create new customer needs
- We use innovation and new technologies to capture these needs

We provide innovative access solutions

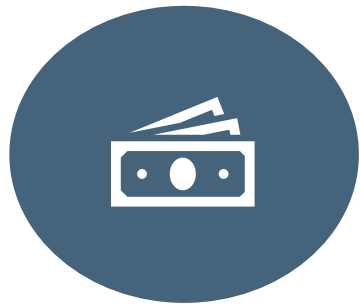
- We explore technologies like energy harvesting, connectivity, seamless access and data analytics
- We drive the next leap in smart home access (e.g. Matter)
- We partner with tech giants to deliver mobile access
- We collaborate with industry peers to develop the next generation of seamless access



>1,200
products launched during the
last three years

>500
patents filed during the last
three years

~4%
R&D costs as % of revenues



Cost-efficiency in everything we do



Professional
sourcing



Efficient
manufacturing
footprint



Logistics and
supply chain



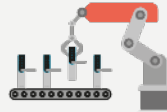
Value analysis,
Value engineering



Operational
excellence

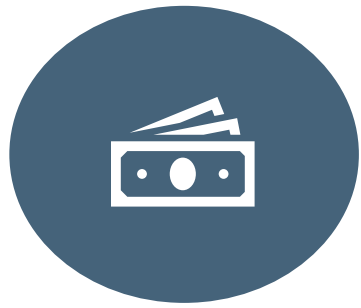


Smart factory



Enterprise IT and
digital trust





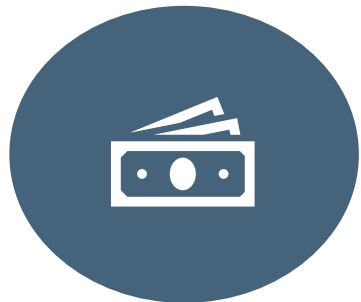
Cost-efficiency in everything we do



Efficient
manufacturing
footprint



- Constant need to target savings and find synergies
- 8 programs launched since 2006 with annual savings of ~SEK 6 bn
- MFP 9 to be launched during Q1 2023



Cost-efficiency in everything we do



MFP - EMEIA example

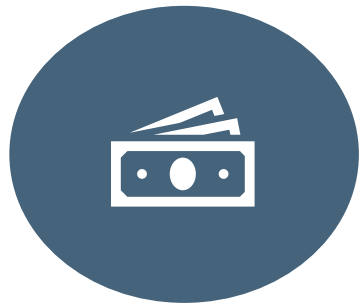
Project details

- Production from 12 countries consolidated into ASSA ABLOY Rychnov site
- Created a Centre of Excellence for cylinders and elmech locks
- Production running 24/7 compared to 1-2 shifts in original factories

Key benefits generated

- Labour efficiency (produced cylinders per HC) increased 5x
- Economy of scale benefits for material sourcing, components production and support functions
- R&D and Production in the same place, leading to around 30% increase in key technologies utilization
- Connected machines, on-line tracking of performance and strong focus on productivity improvements





Cost-efficiency in everything we do



Efficient manufacturing footprint



- Constant need to target savings and find synergies
- 8 programs launched since 2006 with annual savings of ~SEK 6 bn
- MFP 9 to be launched during Q1 2023

Professional sourcing



- Decentralized/local sourcing allows us to act fast and proactively
- Cross-divisional collaborations increase our bargaining power
- Holistic approach from sourcing to customer pricing

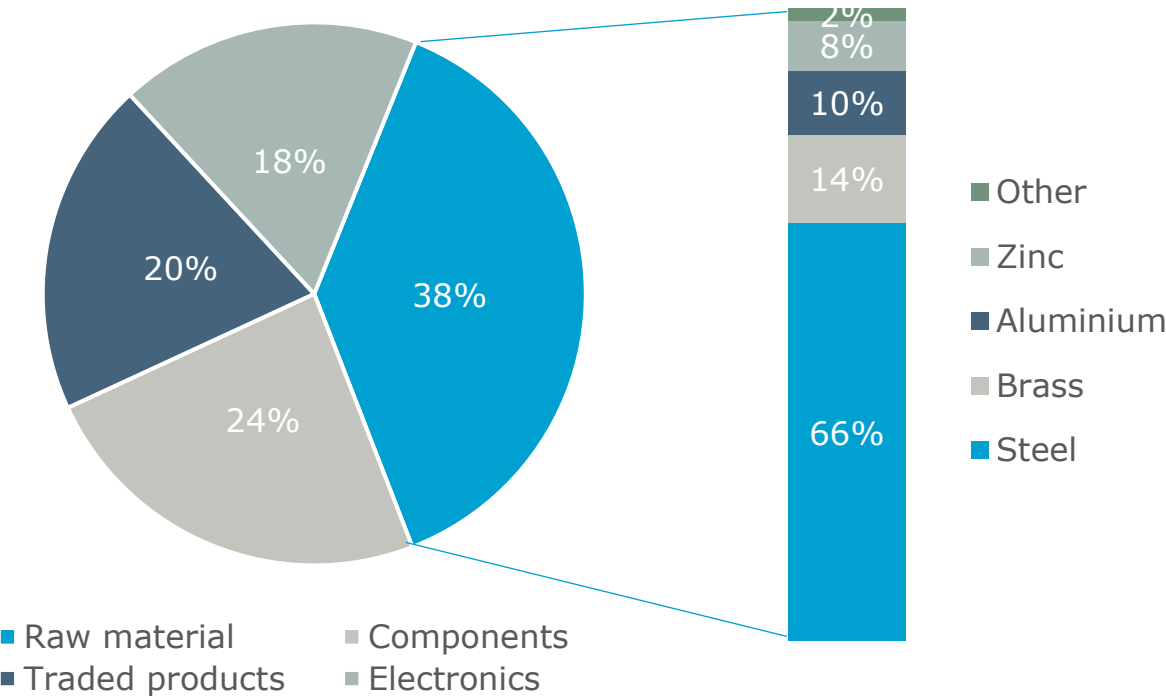


Cost-efficiency in everything we do

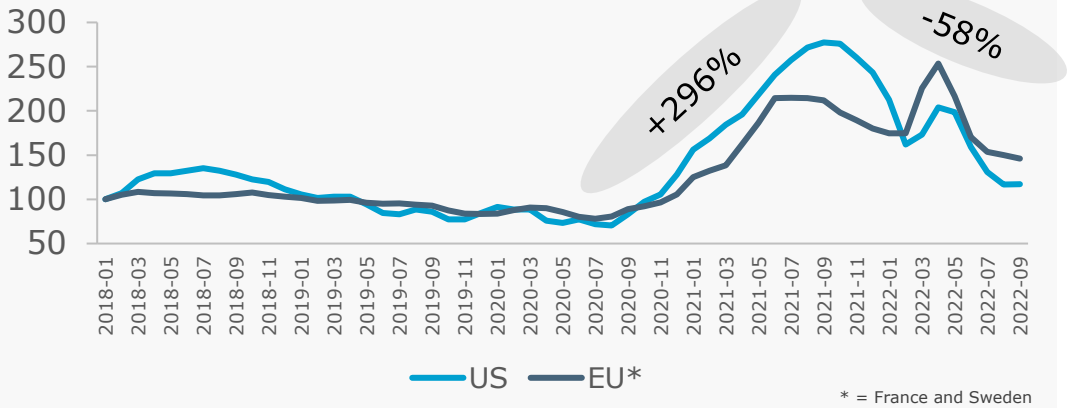


Direct material – 37%

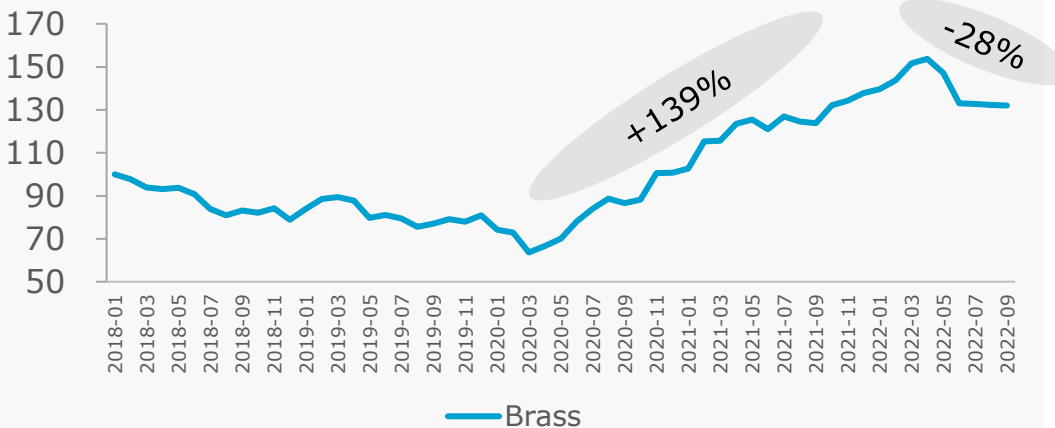
Raw material

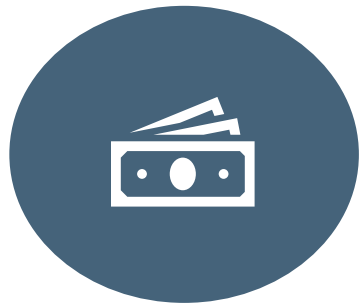


Steel index

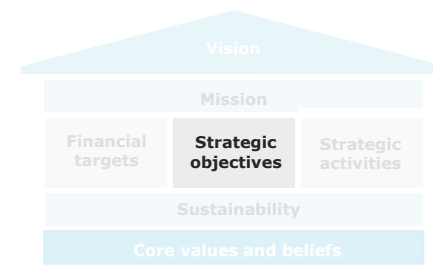


Brass index





Cost-efficiency in everything we do



Efficient manufacturing footprint



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Professional sourcing

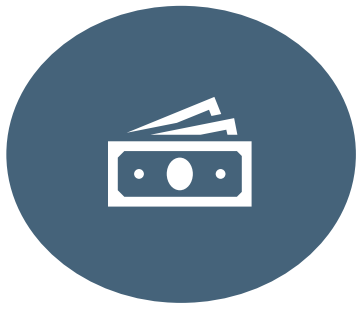


- Decentralized/local sourcing allows us to act fast and proactively
- Cross-divisional collaborations increase our bargaining power
- Holistic approach from sourcing to customer pricing

Logistics and supply chain



- Kept industry-leading lead-times despite global supply chain issues
- Increased internal collaboration to address supply chain issues
- Further optimize the global supply chain



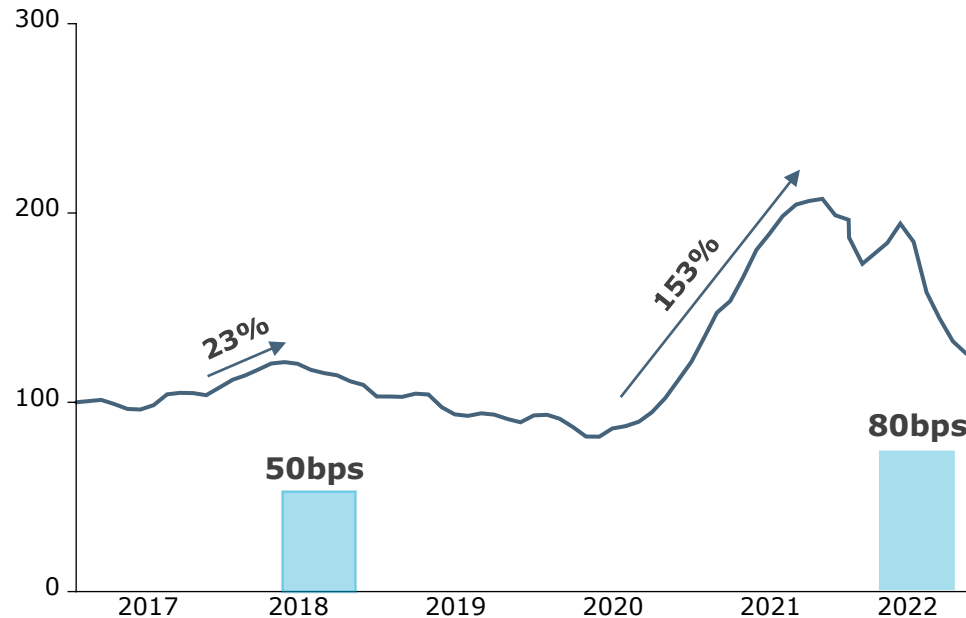
Cost-efficiency in everything we do



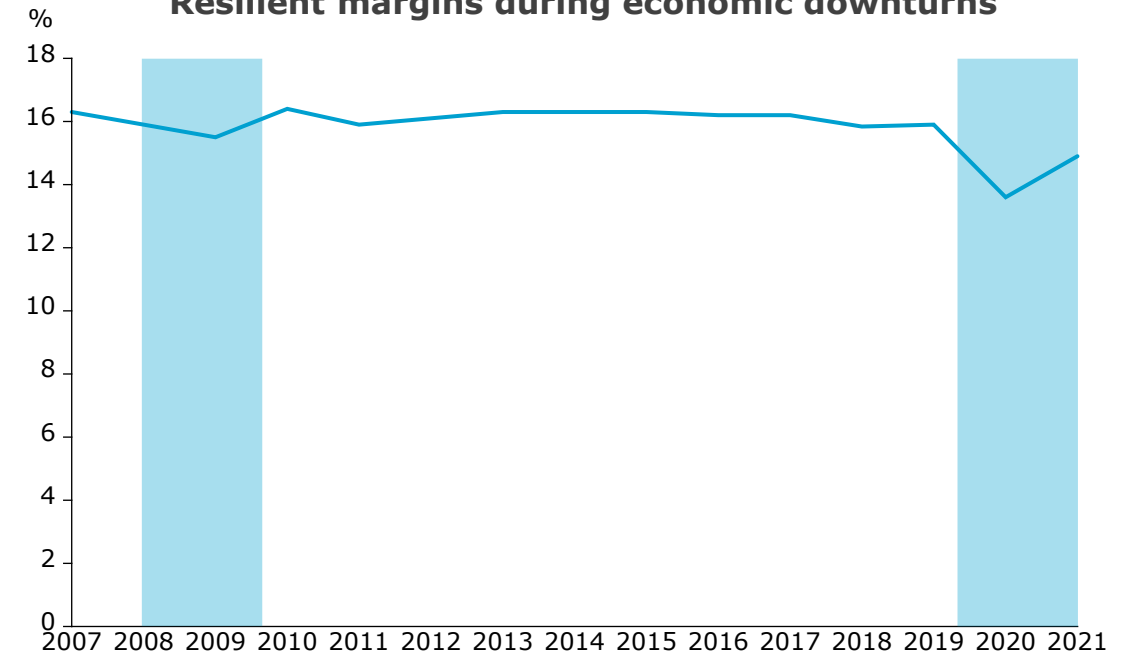
Resilient business model and margin

- Large and robust aftermarket business
- The sticky service and SaaS-businesses are continuing to grow
- Decentralized operating model enables us to move fast
- Constantly exploring ways to increase the efficiency in our operations

ASSA ABLOY weighted raw material index and peak headwinds



Resilient margins during economic downturns



Note: Excluding write-downs in China, MFP and positive revaluations of agta record



Evolution through people



Common culture



Employee experience



Talent management



Leadership



Ethical and social responsibility



Health and safety



Digital workplace




Leadership summit 2022



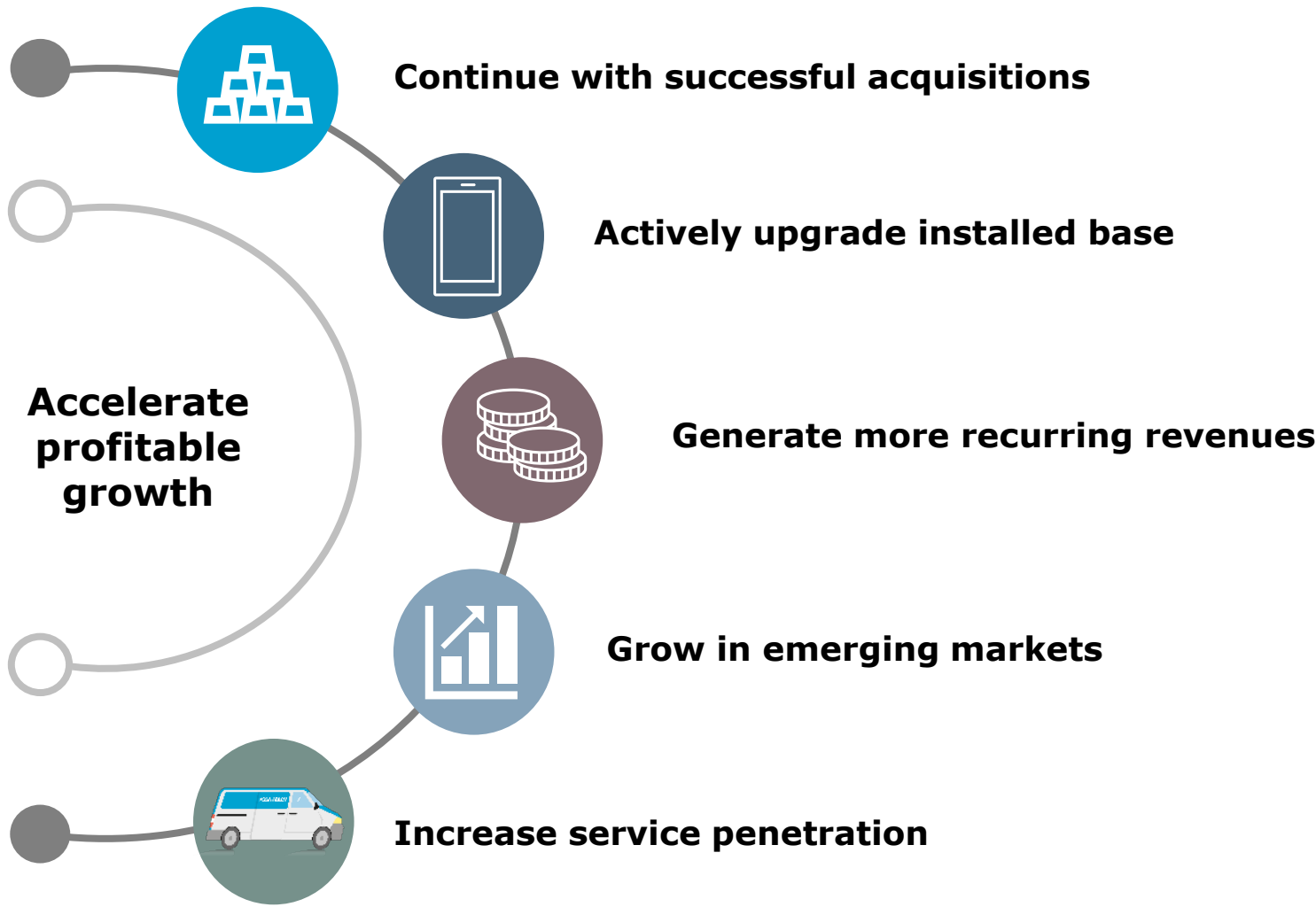


Evolution through people






Common culture	Health and Safety	Diversity and Inclusion	Talent Management
<p><i>A decentralized organization with a common culture</i></p> <p>How</p> <ul style="list-style-type: none"> • Together we - cultural journey • Core values & believes  <p>Together we</p>	<p><i>The health and safety of our employees is a top priority</i></p> <p>How</p> <ul style="list-style-type: none"> • Establish risk-based approach • Well-being and "Together we are safe" programs <p>-20% reduced injuries since 2019</p>	<p><i>An inclusive workplace</i></p> <p>How</p> <ul style="list-style-type: none"> • Diversity and inclusion are embedded in our culture • Female role models and success stories <p>32 nationalities in leading positions</p> <p>27% females in leading positions</p>	<p><i>Attract, develop, and retain talent are key for our success</i></p> <p>How</p> <ul style="list-style-type: none"> • Succession planning and internal mobility • Internal talent acquisition <p>+25% increase in internal applications since 2017</p>

Strategic activities to accelerate profitable growth

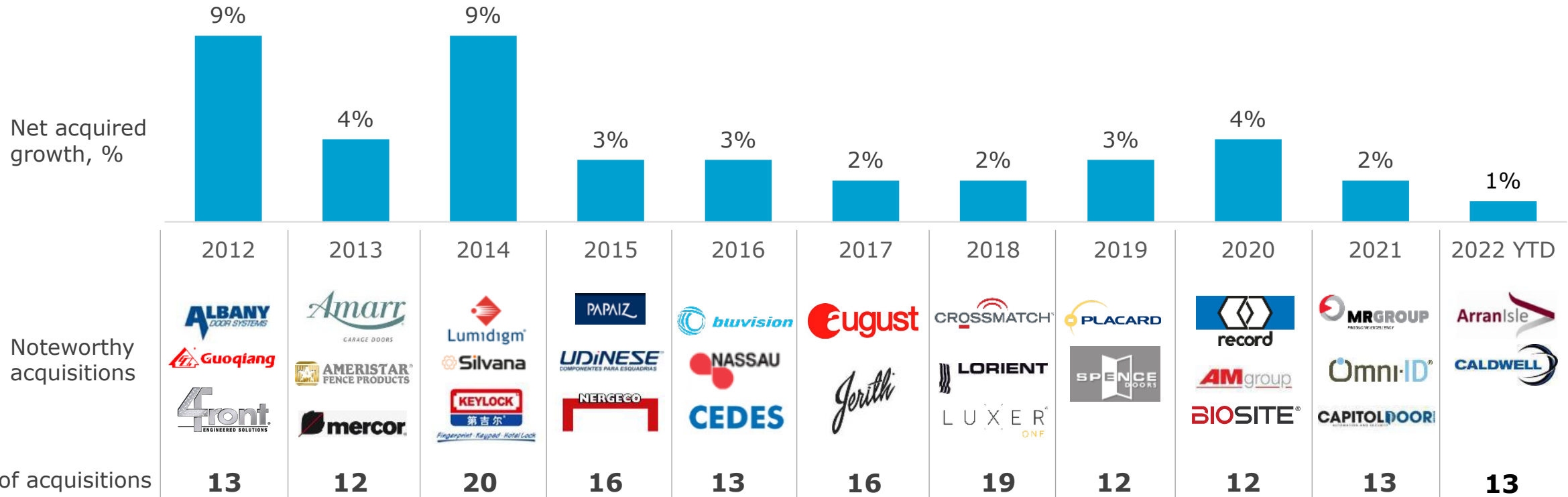


Growth enablers

-  Consolidate footprint and focus on value added
-  Optimize logistics
-  Reduce product cost



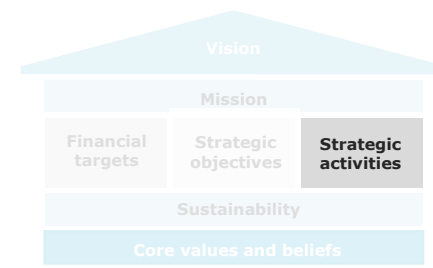
Continue with successful acquisitions



As of 30 Sep 2022

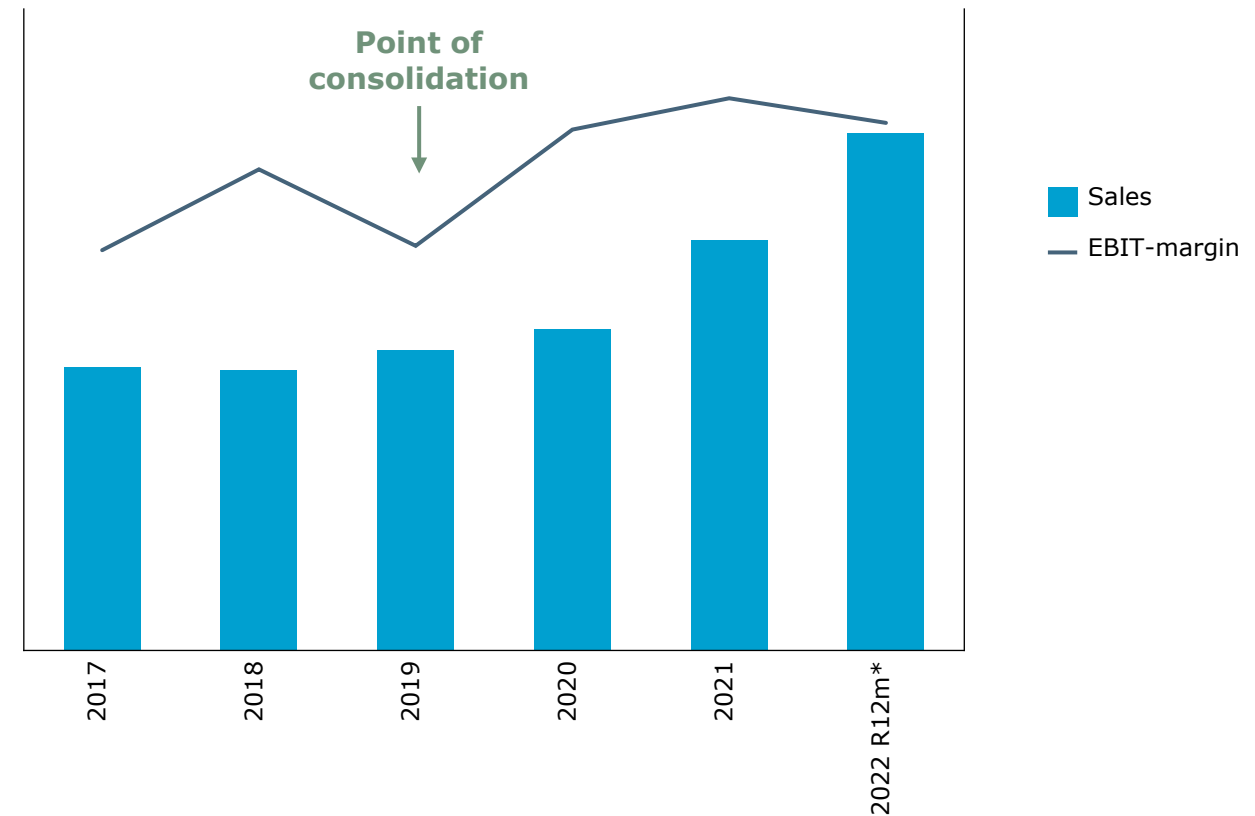


Continue with successful acquisitions



- Acquired in 2019
- A leading provider of RFID components based in Czech Republic
- Acquisition rationale:
 - Enhanced our position within smart components
 - Flexible manufacturing model, capable of efficiently addressing smaller volume orders
 - Strategically expanded our presence in Central and Eastern Europe
- Sales and operating profit have improved significantly more than the group average

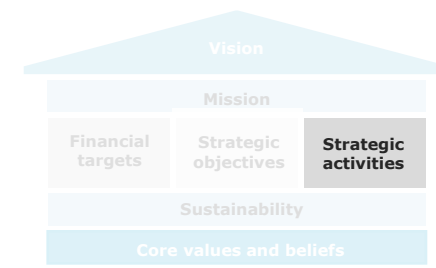
FX-adjusted sales growth and EBIT-margin



* As of 30 Sep 2022



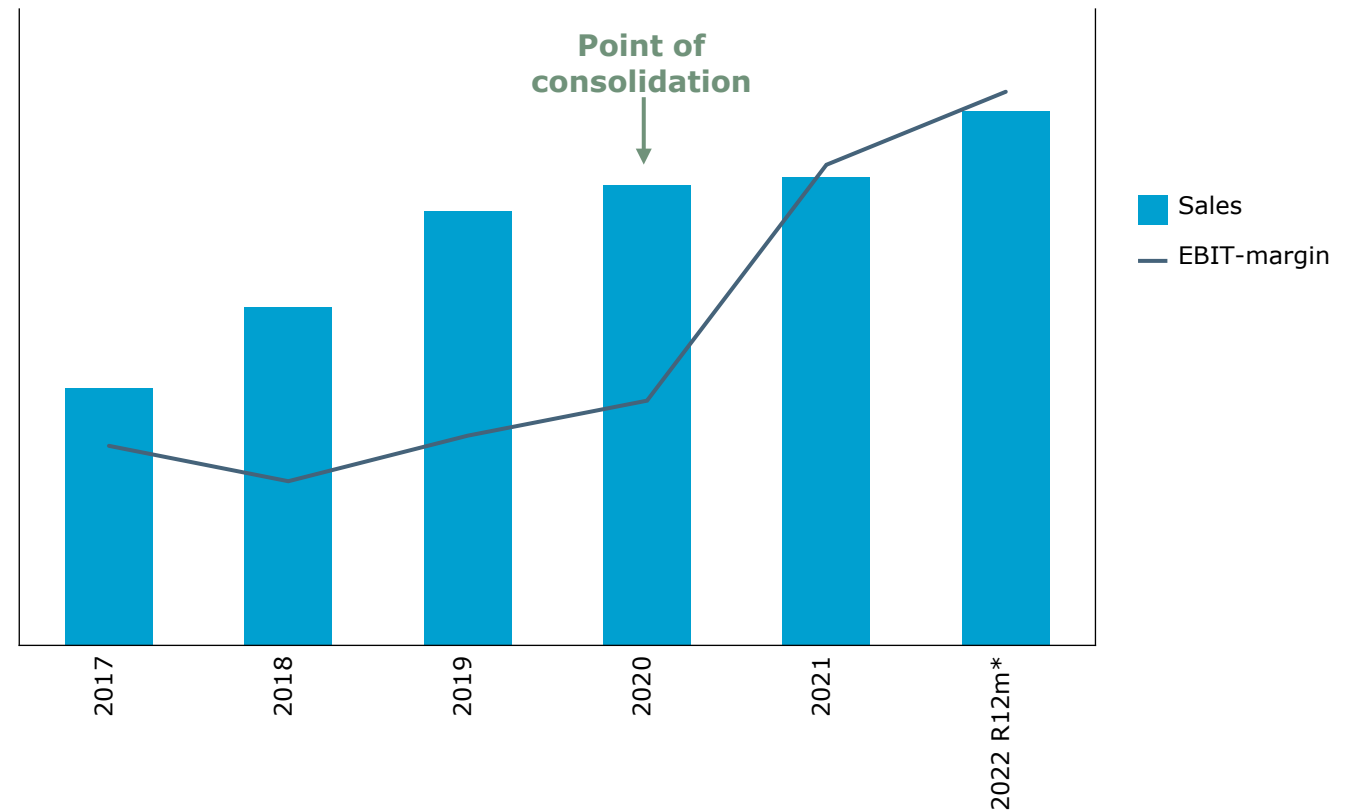
Continue with successful acquisitions



BIO SITE®

- Acquired in 2020
- A leading solutions provider of biometric access control to the construction industry
- Acquisition rationale:
 - True solutions provider to the construction market
 - High share of recurring revenue
 - Synergies on technology and hardware as well as sales synergies
- Strong sales growth and step-change of the operating margin

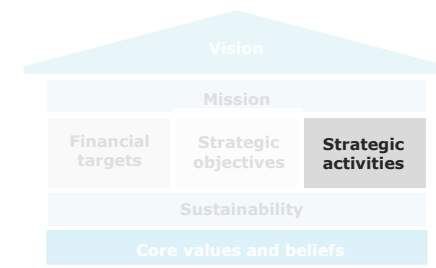
FX-adjusted sales growth and EBIT-margin



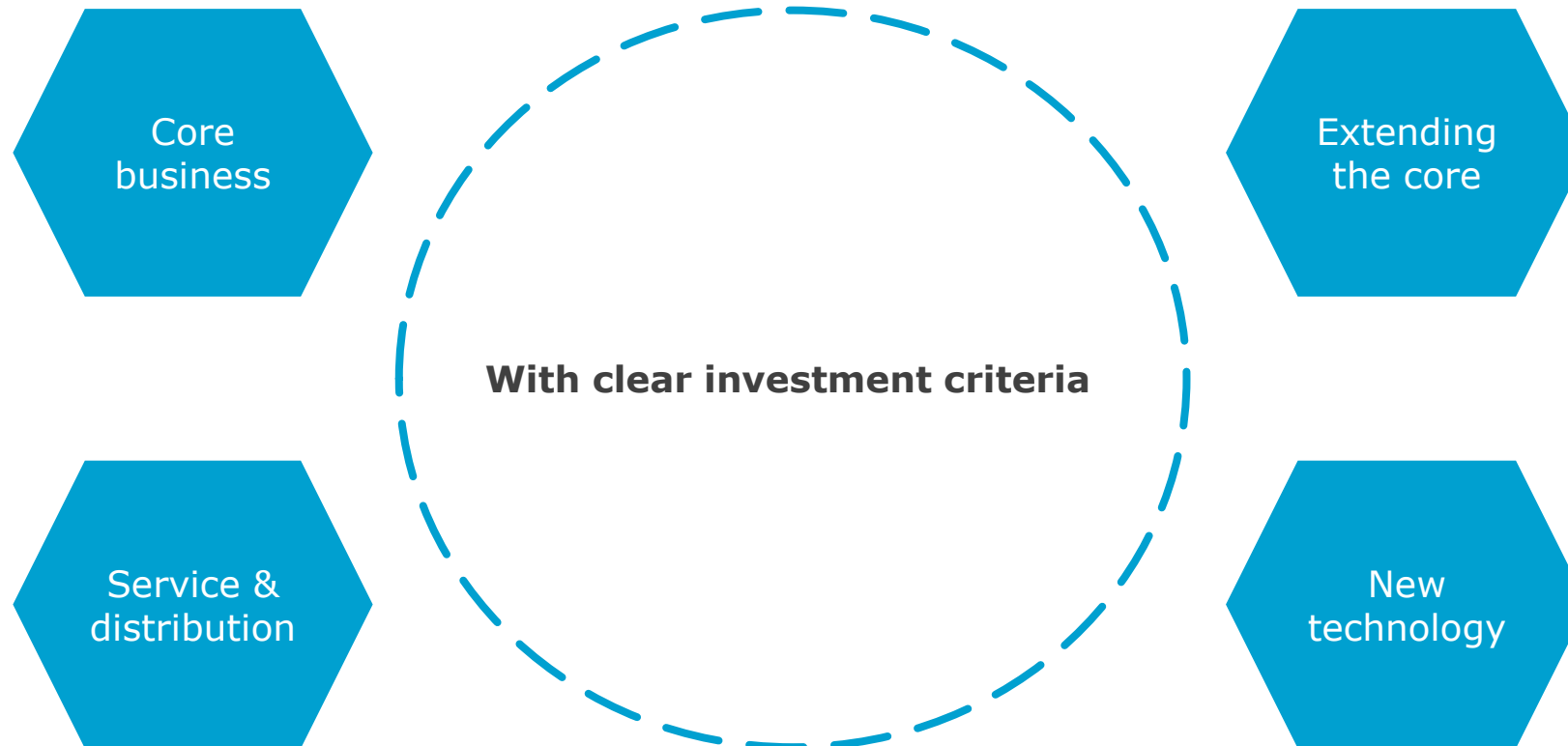
* As of 30 Sep 2022



Continue with successful acquisitions

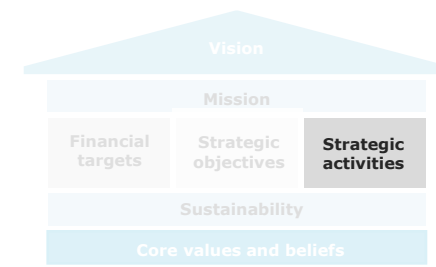


We acquire four types of businesses

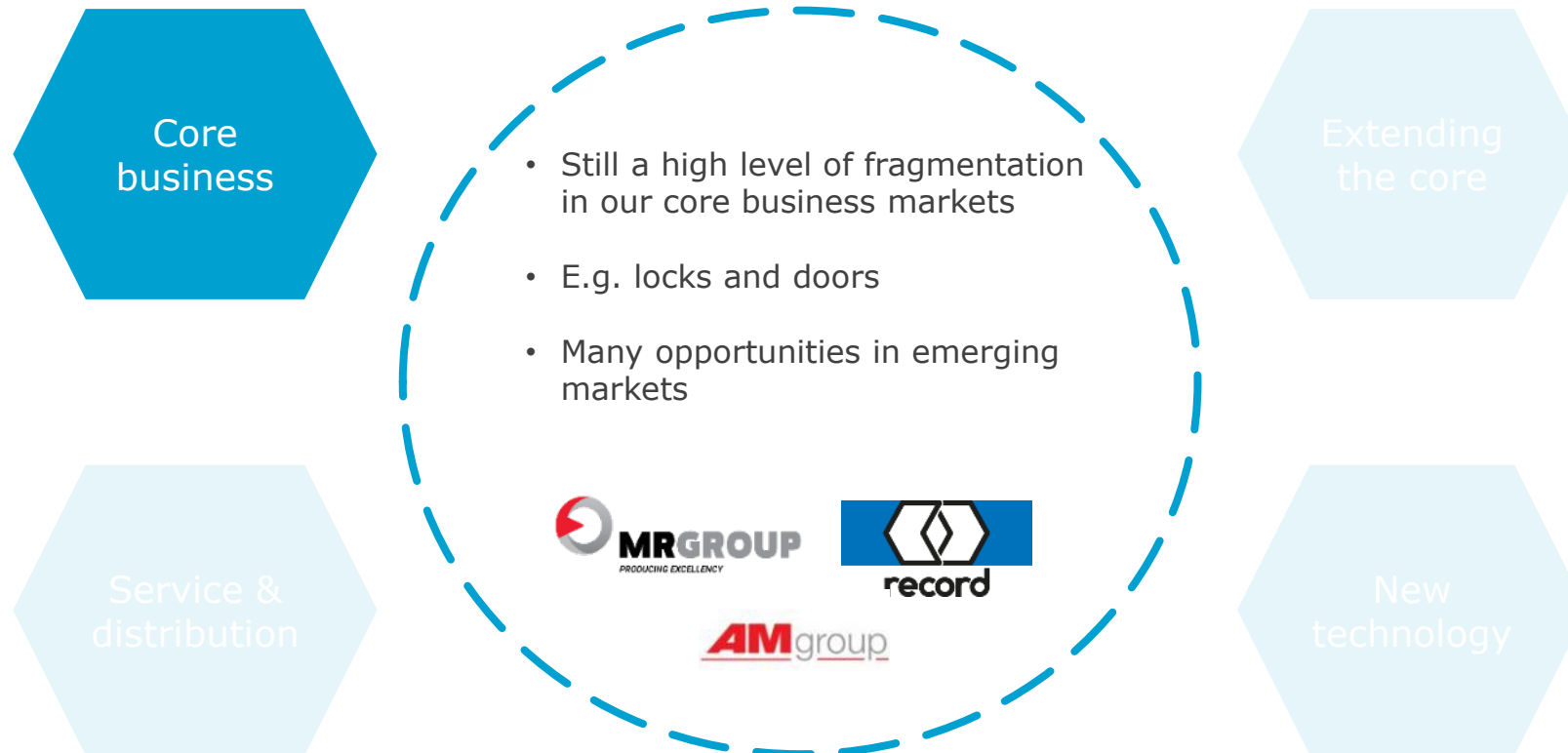




Continue with successful acquisitions

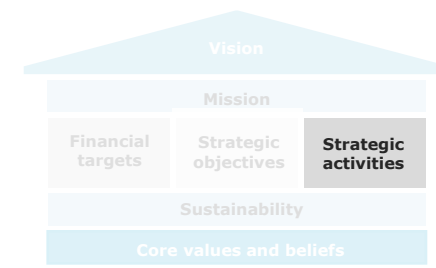


We acquire four types of businesses





Continue with successful acquisitions

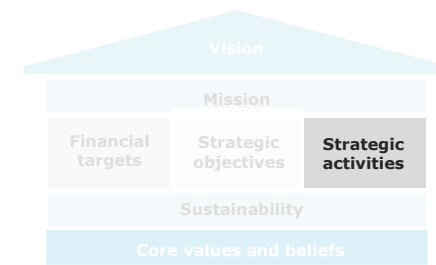


We acquire four types of businesses





Continue with successful acquisitions

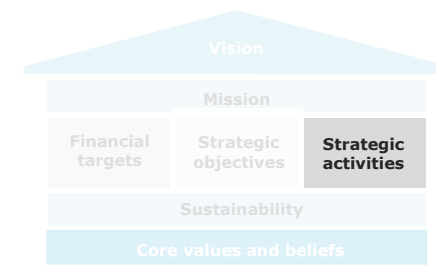


We acquire four types of businesses





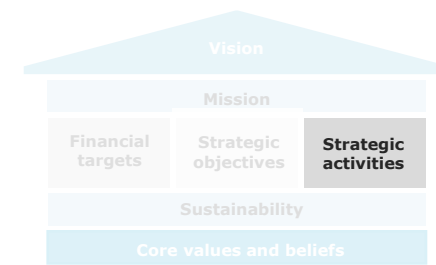
Continue with successful acquisitions



We acquire four types of businesses

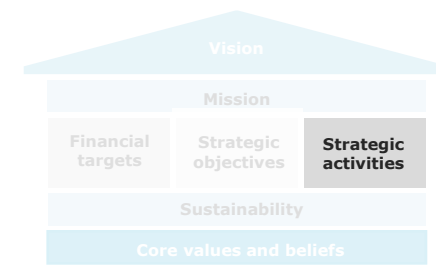


M&A process



M&A and sustainability

- We raise sustainability standards for acquired companies



Emission reduction

- Fully phased out the use of Freon as part of their door insulation process
- CO₂ emission reductions by 73%



H&S improvement

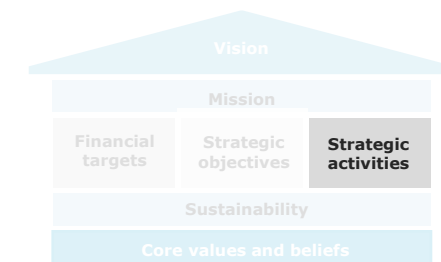
- H&S program & governance launched
- Implementation based on maturity
Process → Behaviour → Culture



Operational excellence

- Improved materials and resource efficiency as well as working conditions
- Using lean methodologies and learnings across all of our door businesses

HHI – the strategic rationale remains valid



Concerns

Market development and performance

- Negative financial trend in HHI
- Expectations of a deterioration in the US residential market



Financing

- Higher interest rates
- Significantly stronger USD



Management focus

- Distracting ASSA ABLOY's management from main operation
- HHI's operations not being optimized during the transitory period



Situation



Market development and performance

- Expected – no change to HHI prospects
- Still strong long-term growth prospects in the US residential market



Financing

- Short-term effect, synergy case remains
- Financing in place - no material effects

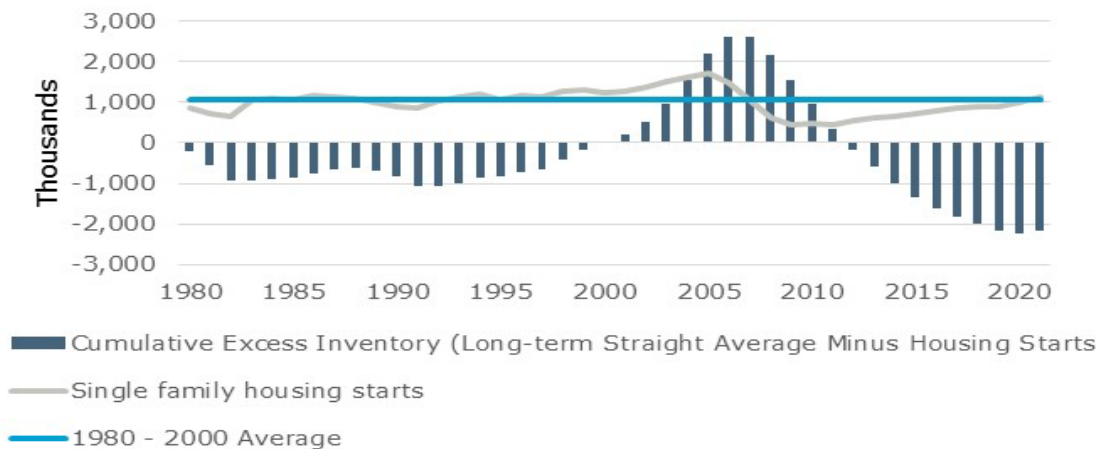


Management focus

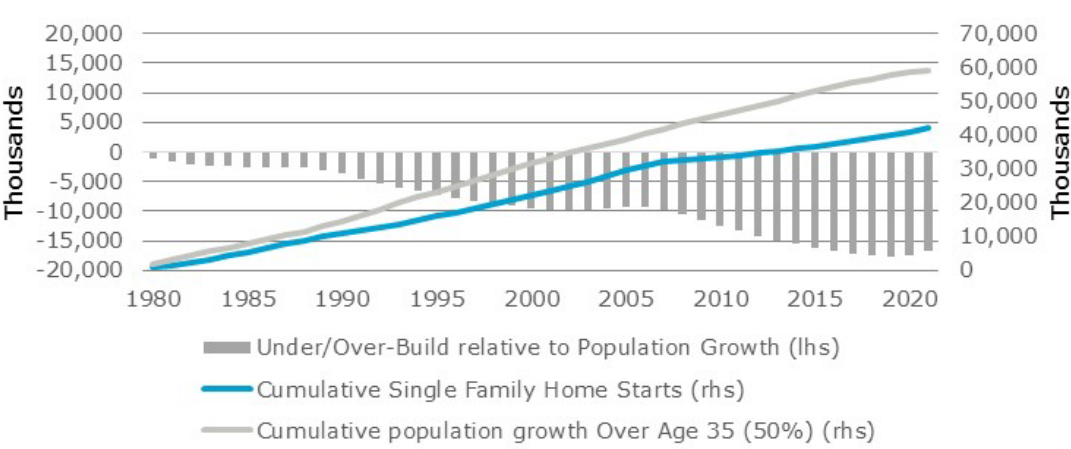
- Small team in Americas and external lawyers focusing on the HHI process
- Experienced management team that will come over to ASSA ABLOY

US Residential: Highly Supportive Demand Backdrop

U.S. Housing is significantly underbuilt¹



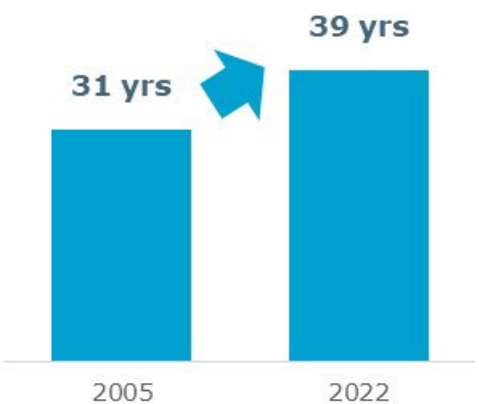
New Housing Starts Have Fallen Short of Population Growth¹



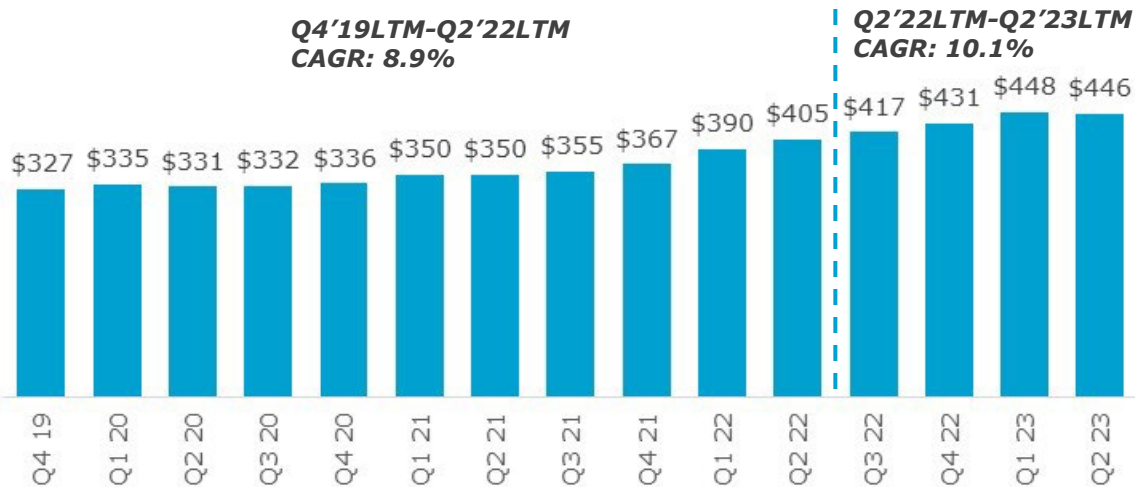
Home-Ownership Rate¹



U.S. Housing Stock (Age)²



Continued strength in R&R Activity³



Source: 1) U.S. Census Bureau. 2) National Association of Homebuilders 3) Harvard leading indicator of remodelling activity (LIRA) Data.

HHI - targeted synergies remain intact

The target of
MUSD 100
in run-rate EBIT
synergies remains

- Increase brand equity – grow premium products and take Kwikset to the next level
- Leverage transition to electromechanical inside buildings
- Grow sales outside of the US
- Cost synergies from HHI's manufacturing platform

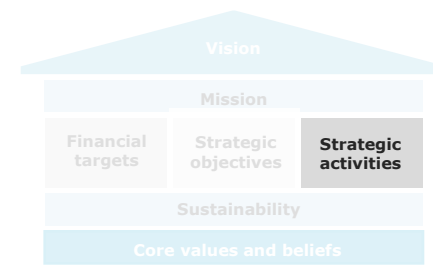
ASSA ABLOY

Spectrum
Brands

Hardware &
Home Improvement



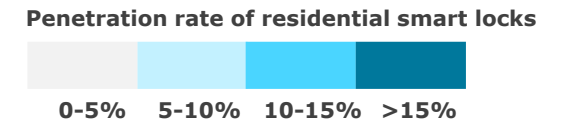
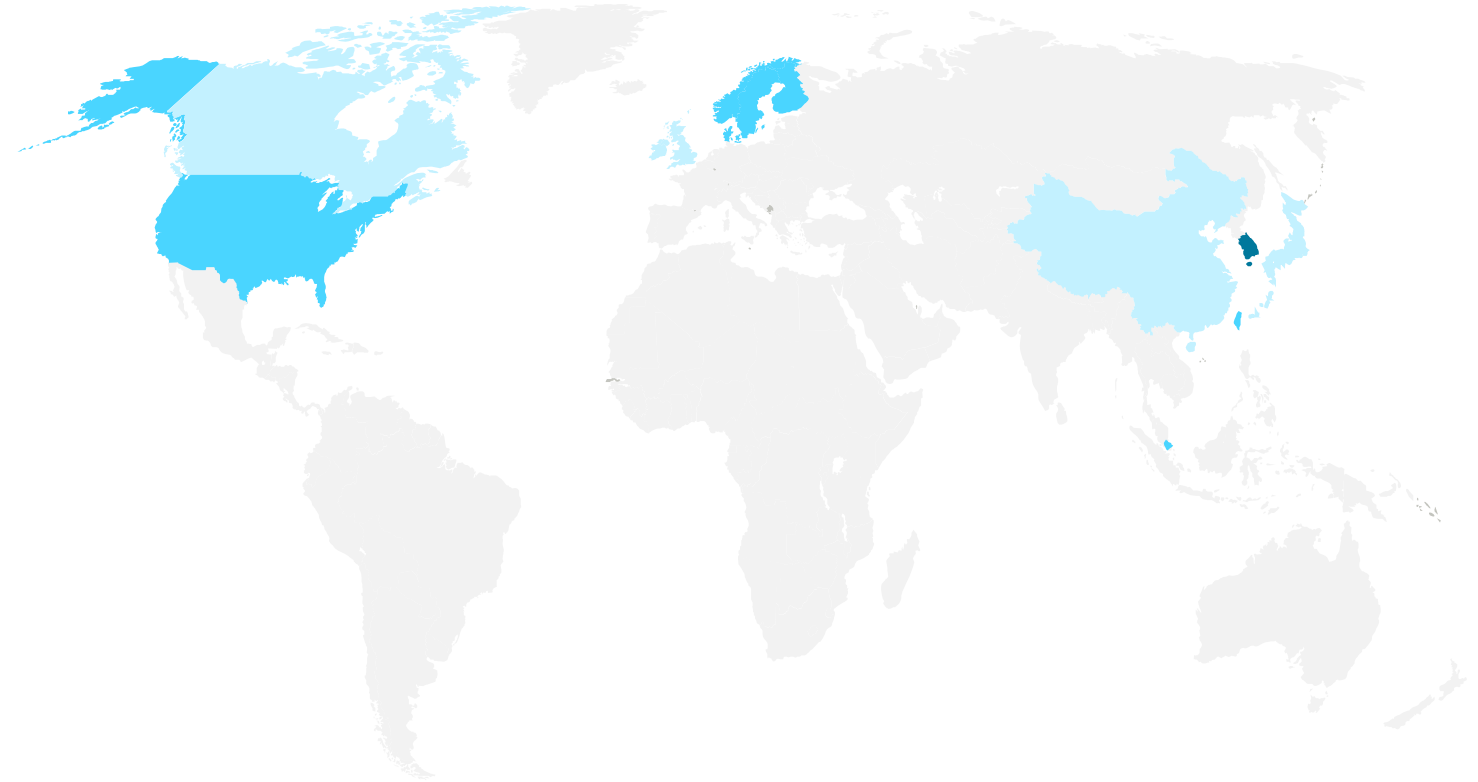
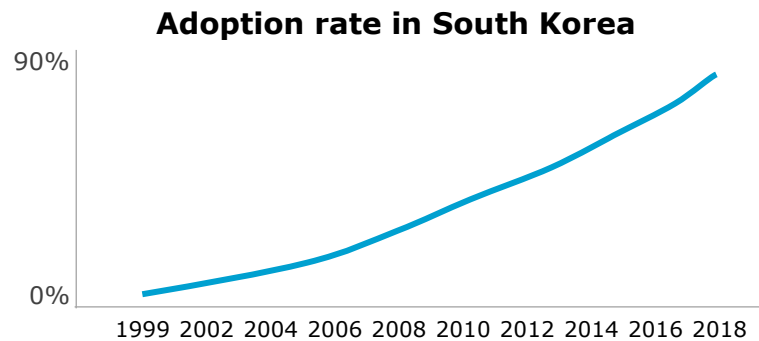
Actively upgrade installed base



Residential

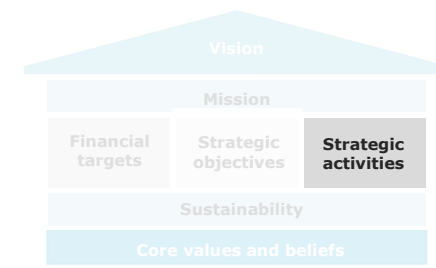
Global residential smart lock penetration rates are still very low...

- The addressable market for residential smart locks is substantial
- South Korea leads the adoption of smart locks with penetration >90%





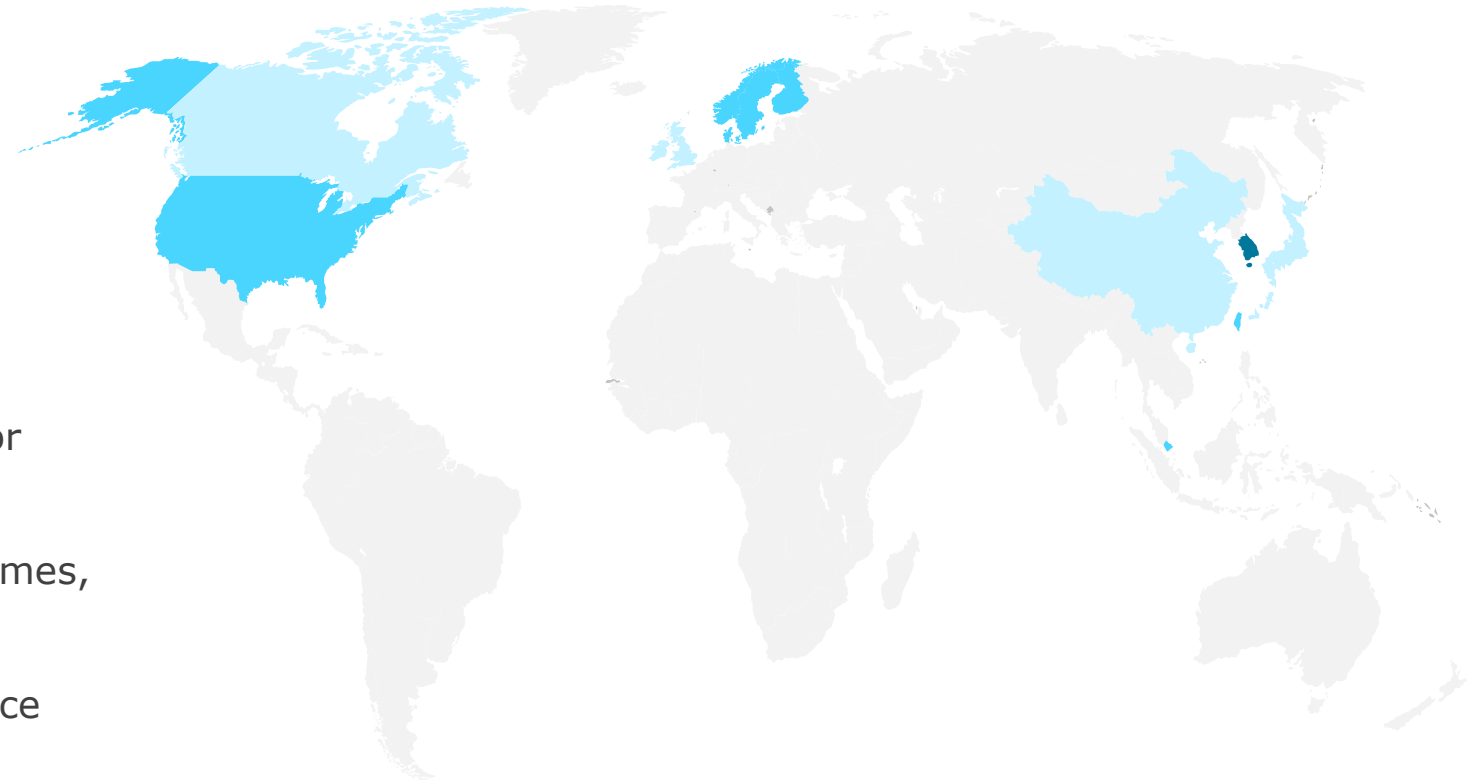
Actively upgrade installed base



Residential

...but favourable trends cater for strong growth ahead

- Millennials entering the housing market
- In-home deliveries increase rapidly, both for food and retail
- Smart locks are penetrating deeper into homes, beyond the perimeter
- Shared economy and Everything as a Service
- New features cater for shorter average lifetime
- Higher average sales price for smart locks than mechanical locks



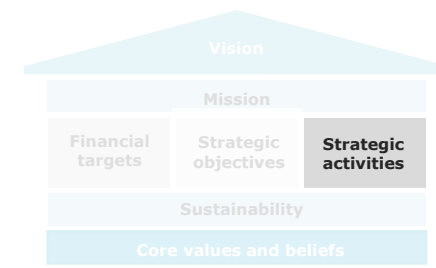
Penetration rate of residential smart locks



0-5% 5-10% 10-15% >15%



Actively upgrade installed base



Non-Residential

Most non-residential end markets are still mechanical

- **Perimeters** of non-residential premises in mature markets are more digitalized
- Low penetration rates **inside buildings**
- **Increasing investments** to upgrade to electromechanical solutions

Education



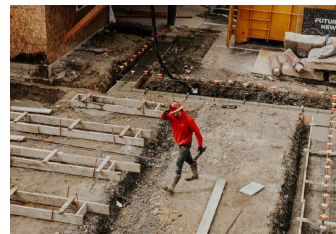
Enterprises



Healthcare



Construction



Critical infrastructure

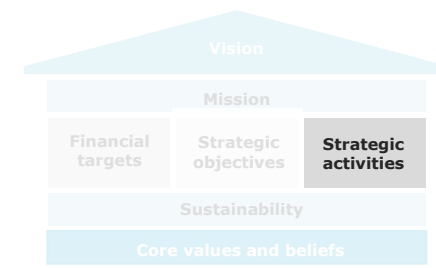


Hospitality





Actively upgrade installed base



Non-Residential

Most non-residential end markets are still mechanical

- **Perimeters** of non-residential premises in mature markets are more digitalized
- Low penetration rates **inside buildings**
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Education



Enterprises



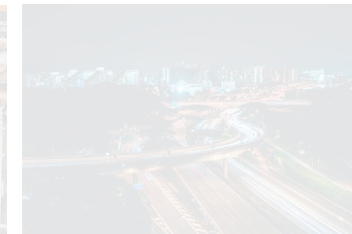
Healthcare



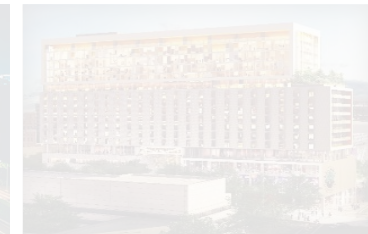
Construction



Critical infrastructure

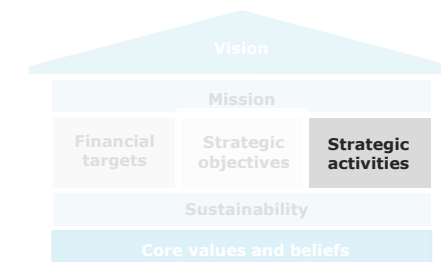


Hospitality





Actively upgrade installed base



Non-Residential

Strong growth drivers for digital access control in the education space

Education



Schools & Universities

- ❖ Greater security
- ❖ Auditability and accountability
- ❖ More efficient processes including enrolment and library services



Students

- ❖ Greater security
- ❖ Convenience - be able to use mobile devices for everything

We offer total solutions for education facilities



Mobile access, access control, visitor management, printing, payment etc.

ASSA ABLOY

Entrance Systems

Sliding doors, revolving doors, fencing

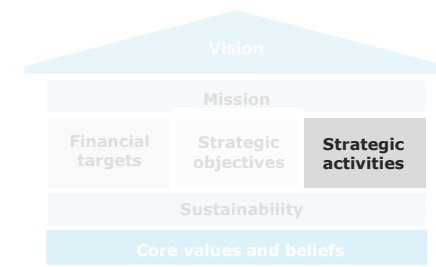
ASSA ABLOY

Opening Solutions

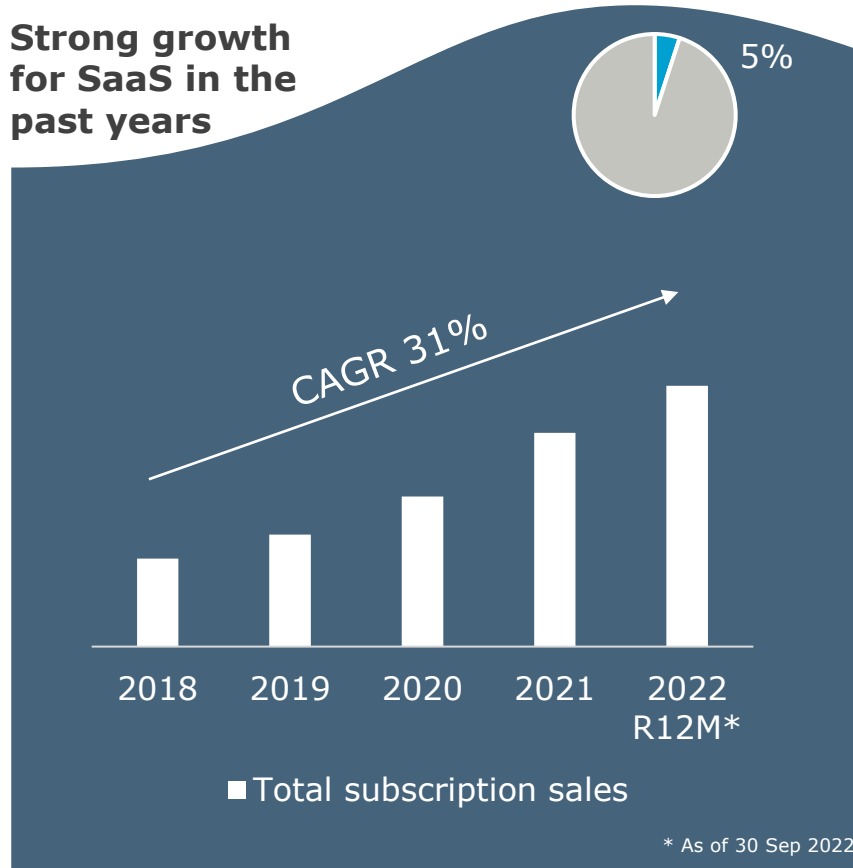
Package delivery, wave-to-open switches, electric strikes, panic devices etc.



Generate more recurring revenues



Strong growth for SaaS in the past years



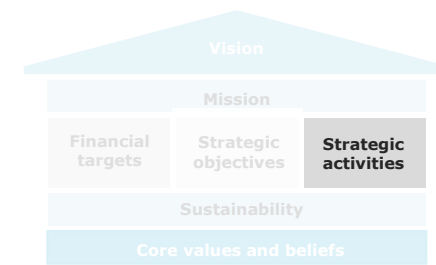
But still significant opportunities ahead



- Mobile keys & credentials
- Identity access management
- Data, hosting & cloud solutions
- Last-mile delivery
- Connected automatic doors
- Access control management



Generate more recurring revenues



LUXER[®]
ONE

- Acquired in 2018
- An advanced US package locker solutions provider helping to solve last-mile delivery challenges
- Package volumes continue to grow every year
- A very resilient business – recurring revenue accounts for ~40% of sales and is growing double digit per annum



End markets and use cases



University

IT equipment repair services, library exchange, safe storage



Office

Employee package management, IT repair and asset exchange, central package destination for multi-tenant office buildings



Multi-family

Package delivery, manager software, video surveillance, outbound shipping

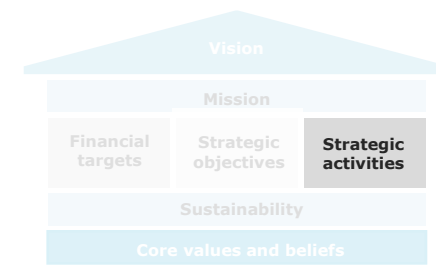


Retail

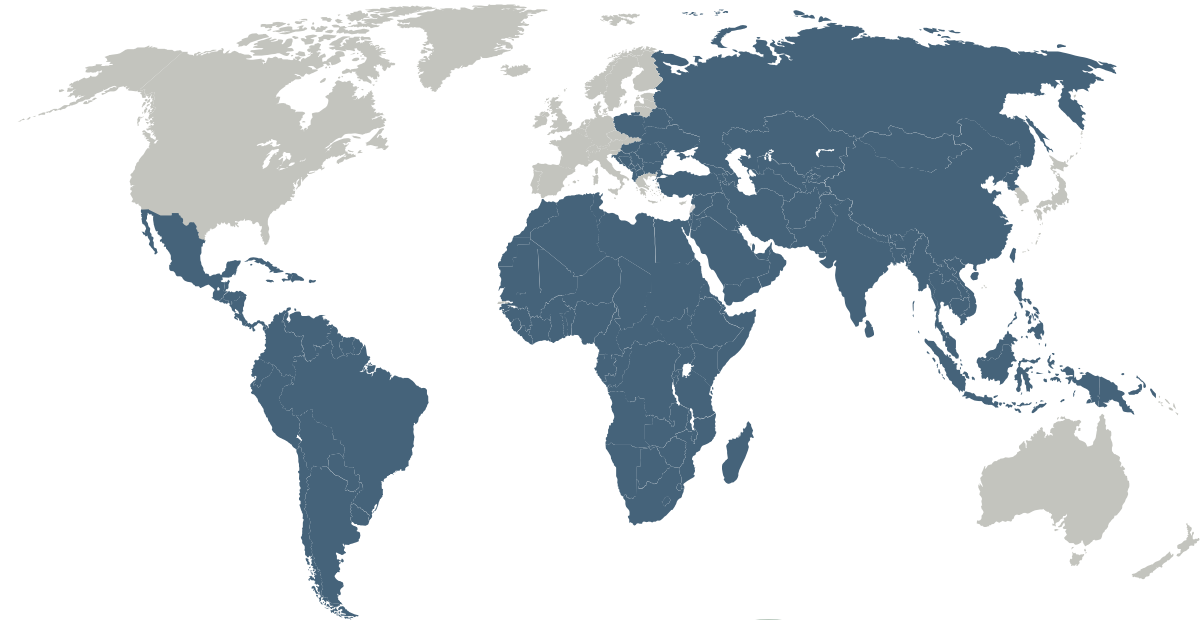
Contactless pickup and returns for traditional retail and grocery stores



Grow in emerging markets



- Emerging markets offer significant growth potential with many untapped opportunities
- We will achieve significantly higher growth through
 - A combination of organic and M&A growth
 - Launch products specifically developed for emerging markets
 - Invest in people and our organization

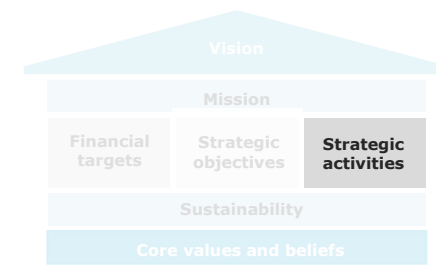


15%
of Group
sales today

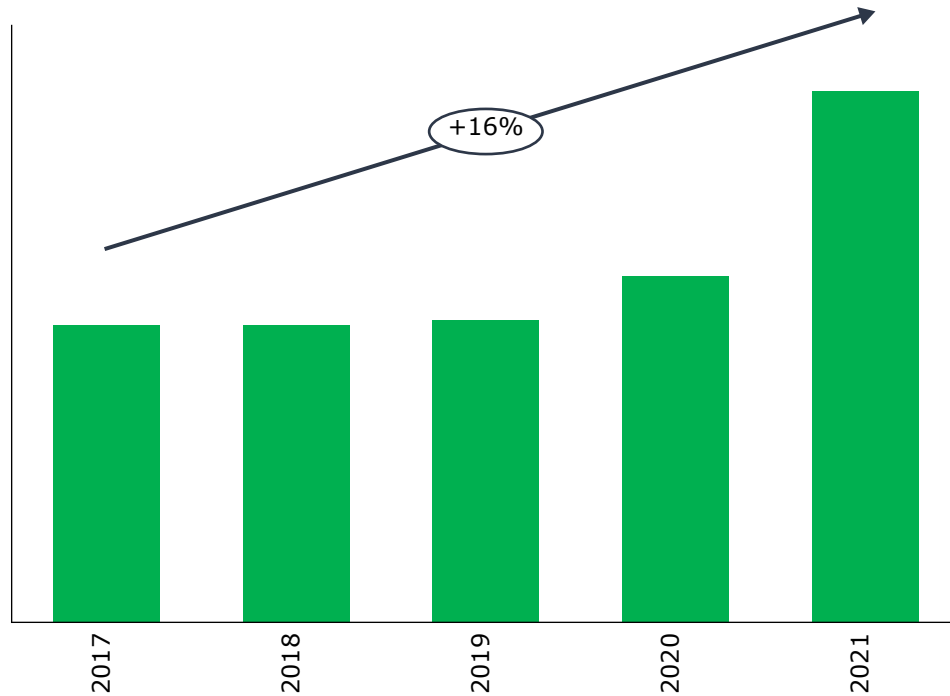


Grow in emerging markets

Breakout
Session

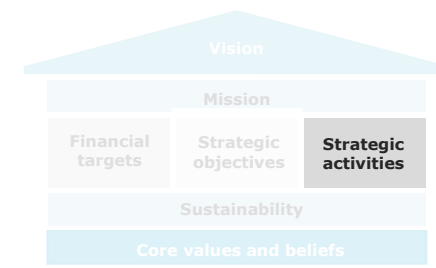


Brazil

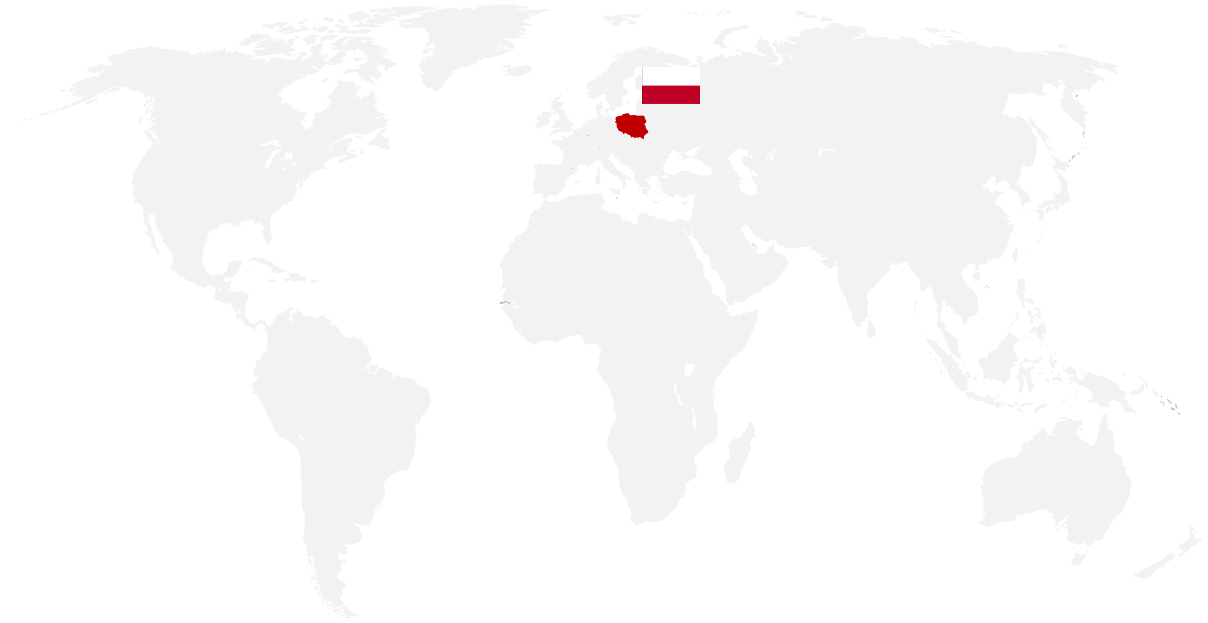
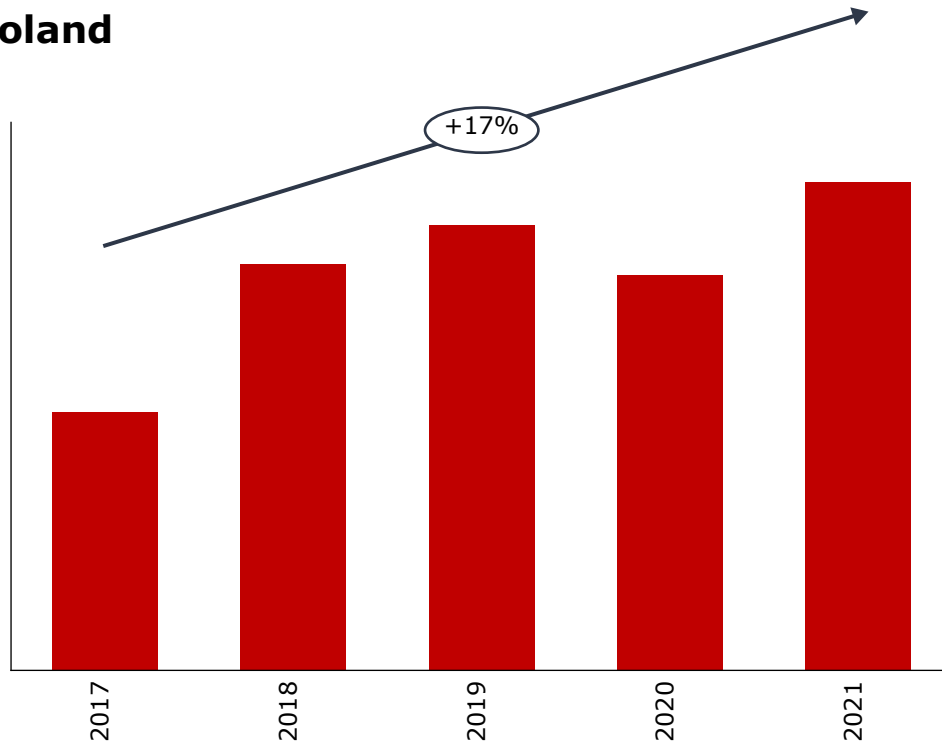




Grow in emerging markets

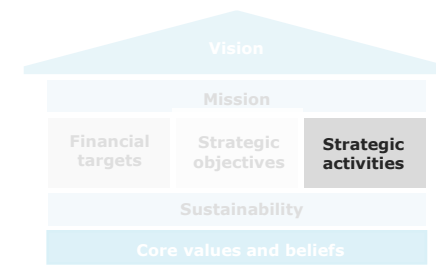


Poland





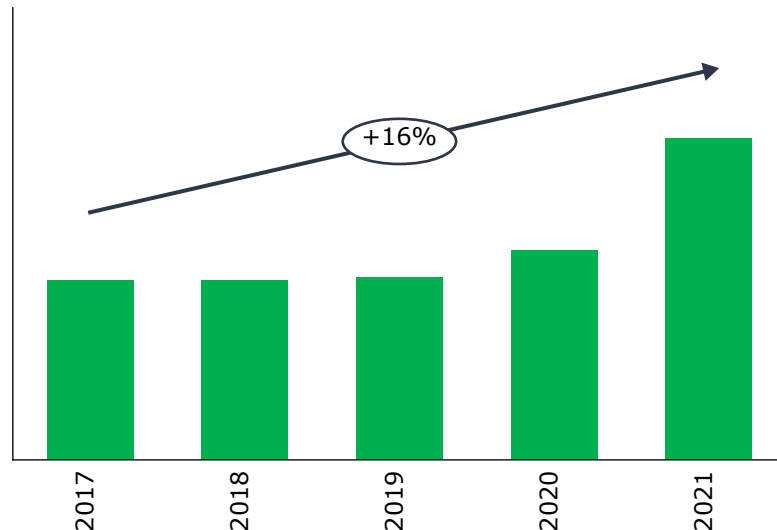
Grow in emerging markets



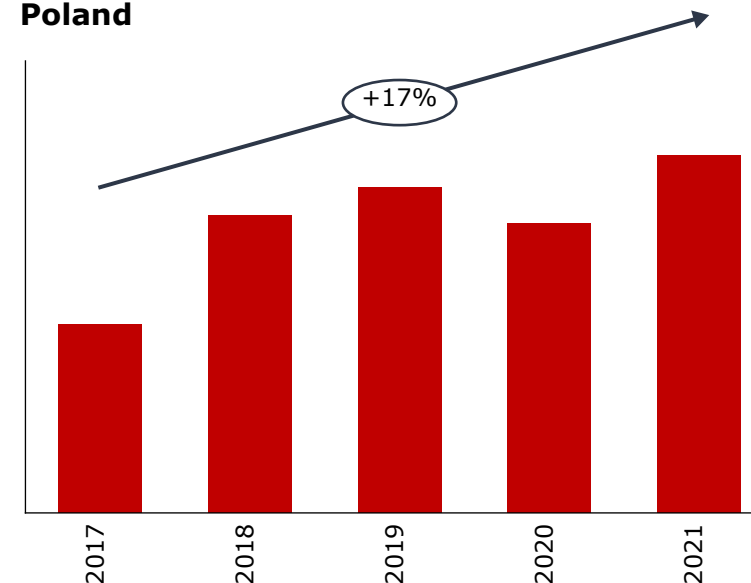
Common attributes for success in these markets

- Acquisitions of market leading companies in strategic product categories
- Feet on the ground - strong local knowledge has enabled adaption of solutions to local needs
- Leverage local brands with ASSA ABLOY Group strength
- Channel and vertical focus

Brazil



Poland





Increase service penetration

**Service
& Product
reinforce
each other**





Increase service penetration

Competitive advantages

**One supplier
to cover all needs**

Geographical coverage

Skilled service technicians



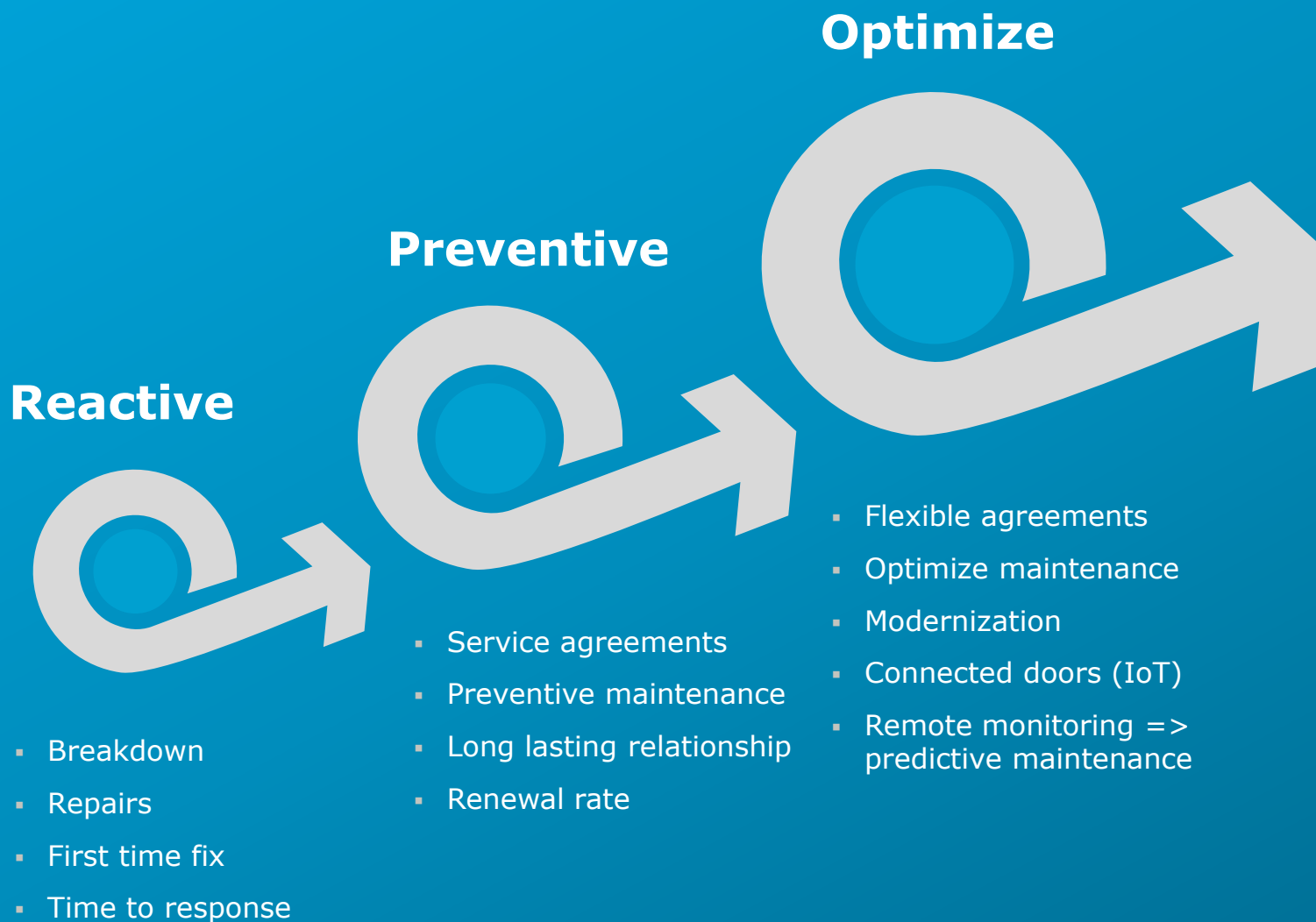
Availability of parts

**Service of all types
of doors and brands**

**Innovative technology
driven service**

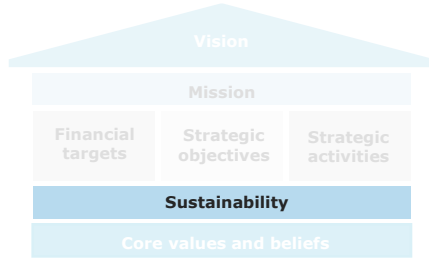


Increase service penetration

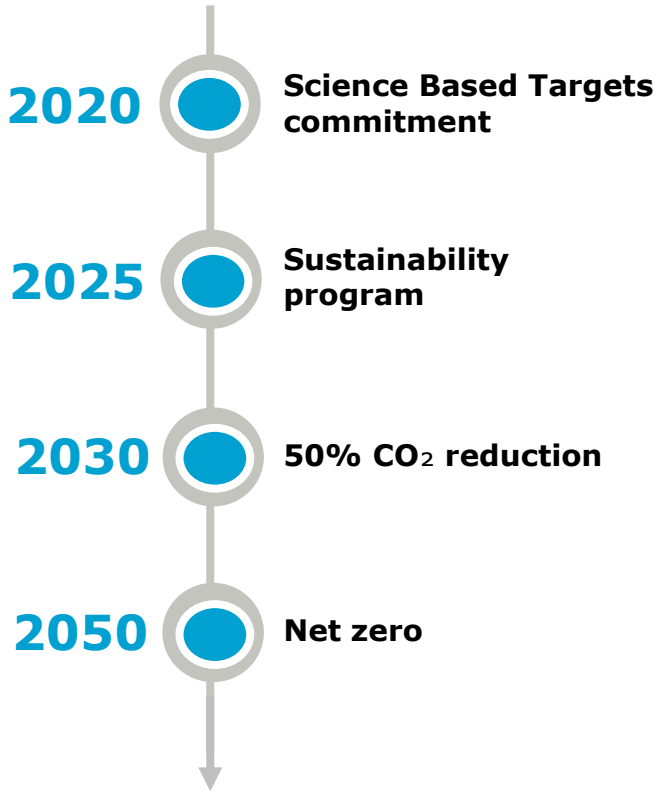
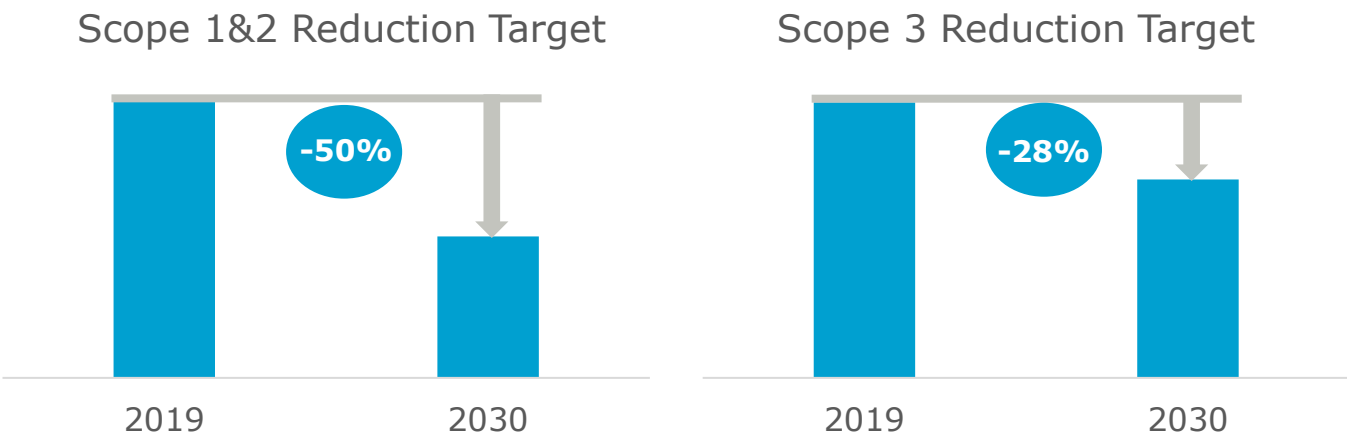


**Walking with
our customers
on their maturity
journey**

Accelerating towards a sustainable future

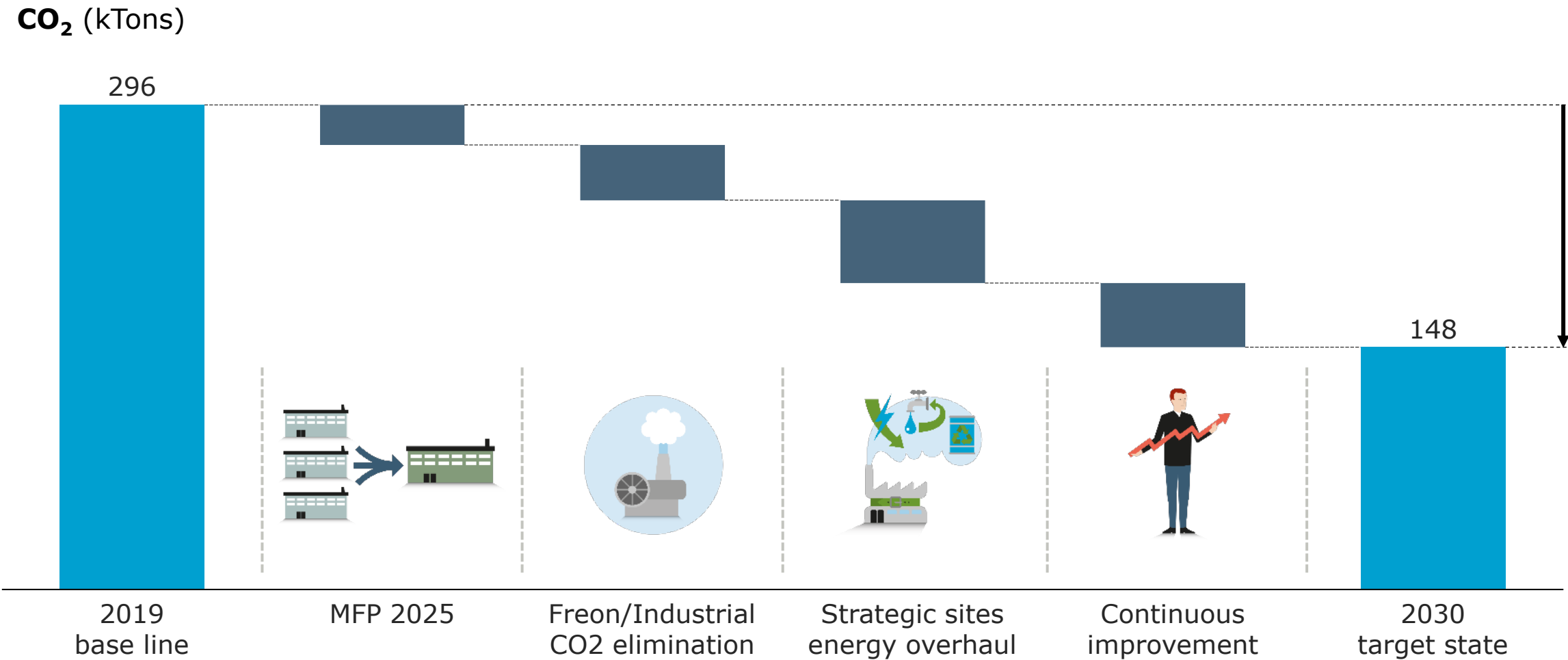
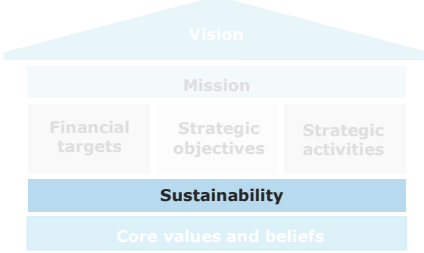


- Sustainability is a natural part of who we are and how we operate
- Science Based Targets
 - We committed to set targets in 2020
 - Targets ratified in 2022

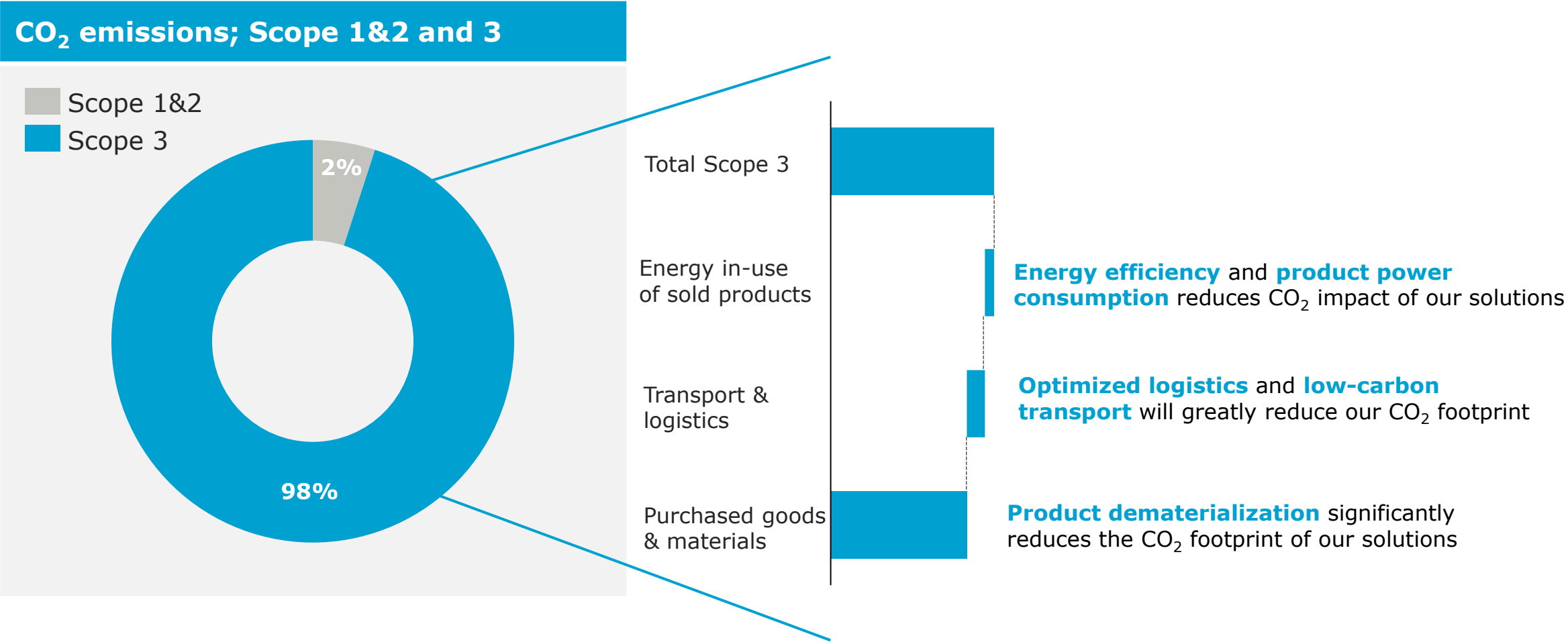
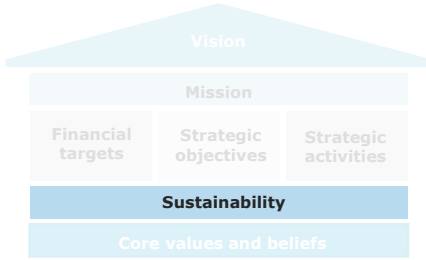


Note: Scope 1+2 = Emissions from own operations. Scope 3 = Total Value Chain emissions, excl. emissions from own operations

4-pronged approach to reduce Scope 1+2 emissions by 50% by 2030



Scope 3 profile and key focus areas



Presentation outline



1

Overview

ASSA ABLOY today

2

We are the market leader in a good industry

Trends create underlying strong demand

3

Our strategic framework

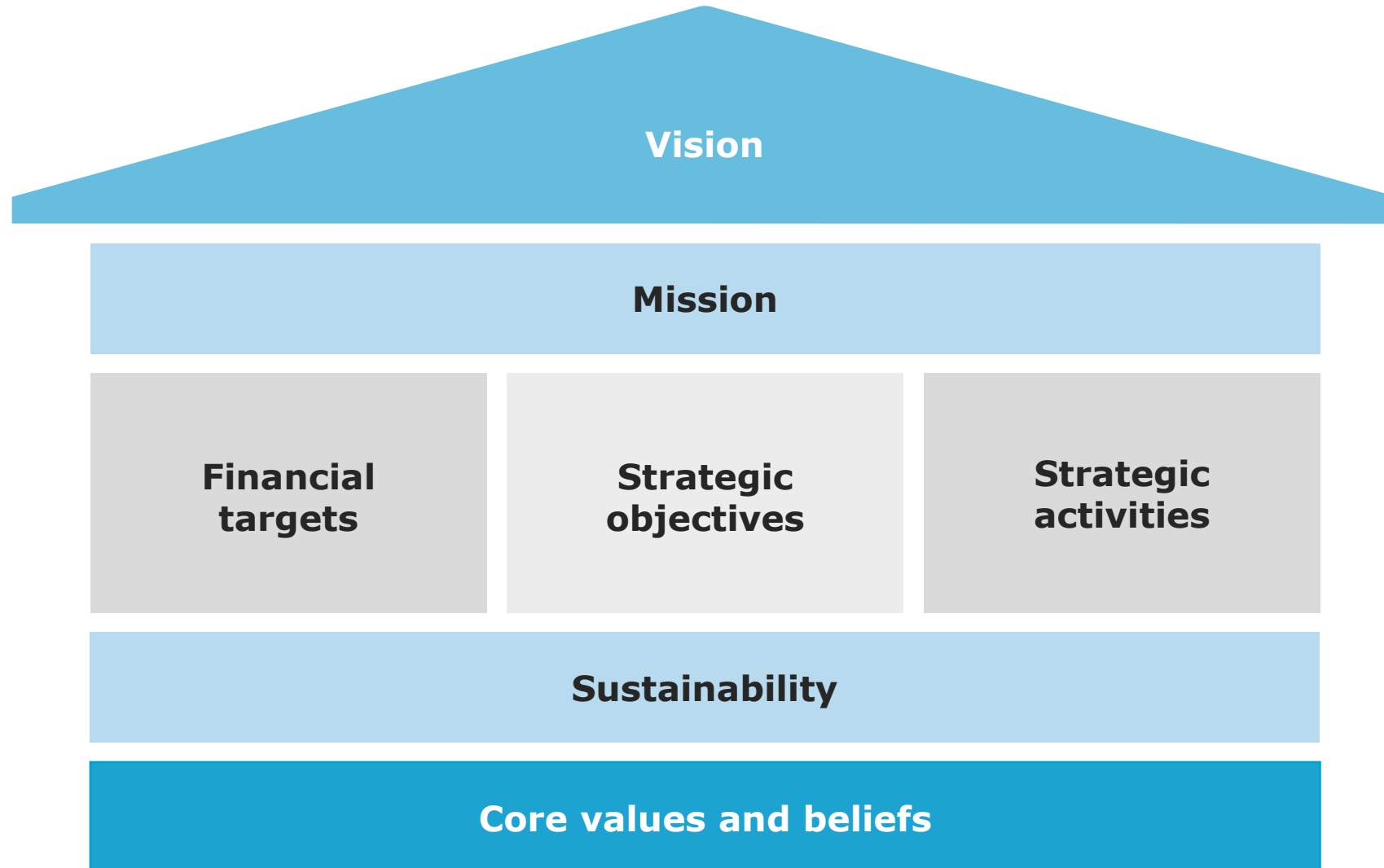
Accelerate profitable growth

4

Key takeaways

The market leader in an industry with strong fundamentals

Our strategy is further evolving

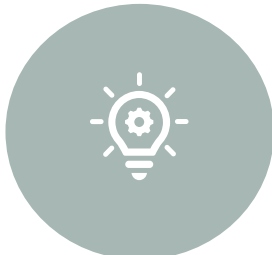


Reaching our goals is built on our strategic objectives

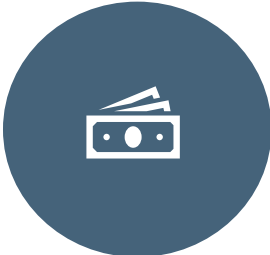
**Growth through
Customer
relevance**



**Product leadership
Through
Innovation**



**Cost-efficiency
In everything
We do**



**Evolution
Through
People**



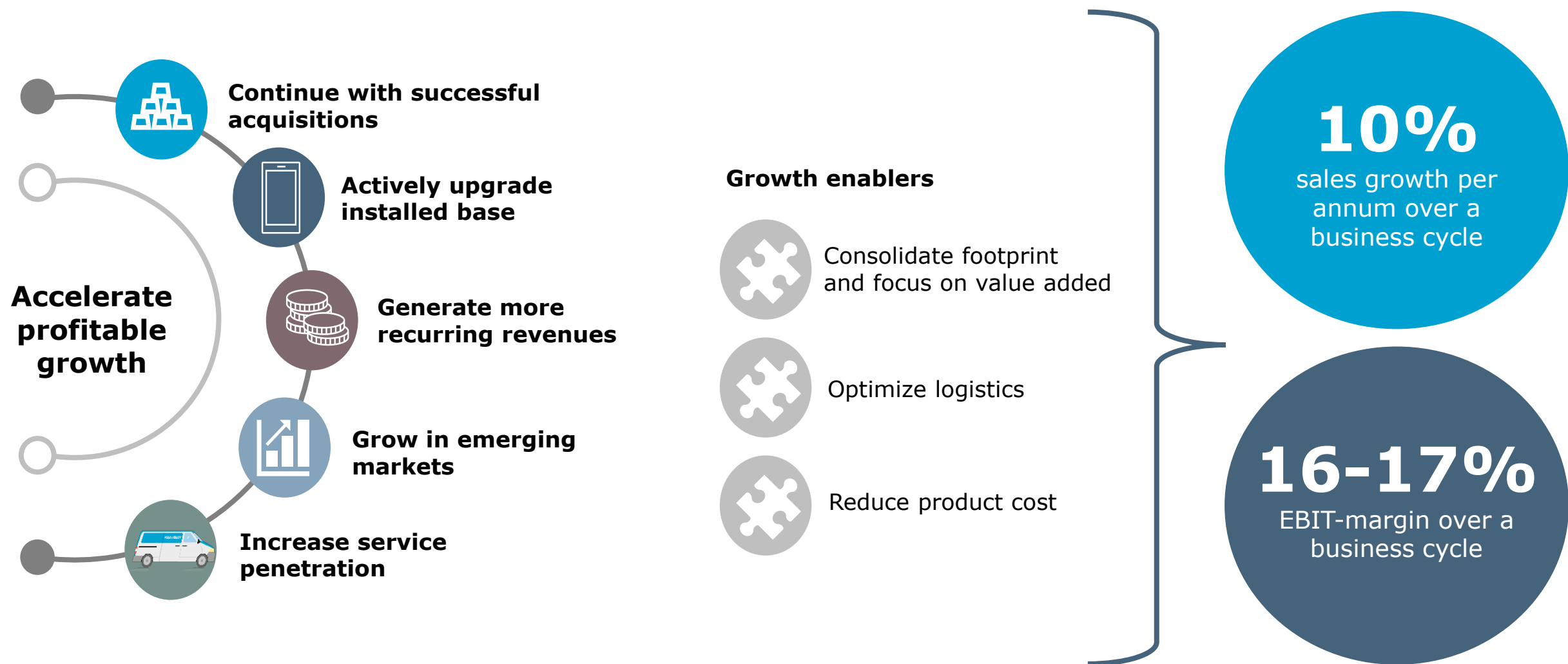
10%

sales growth per
annum over a
business cycle

16-17%

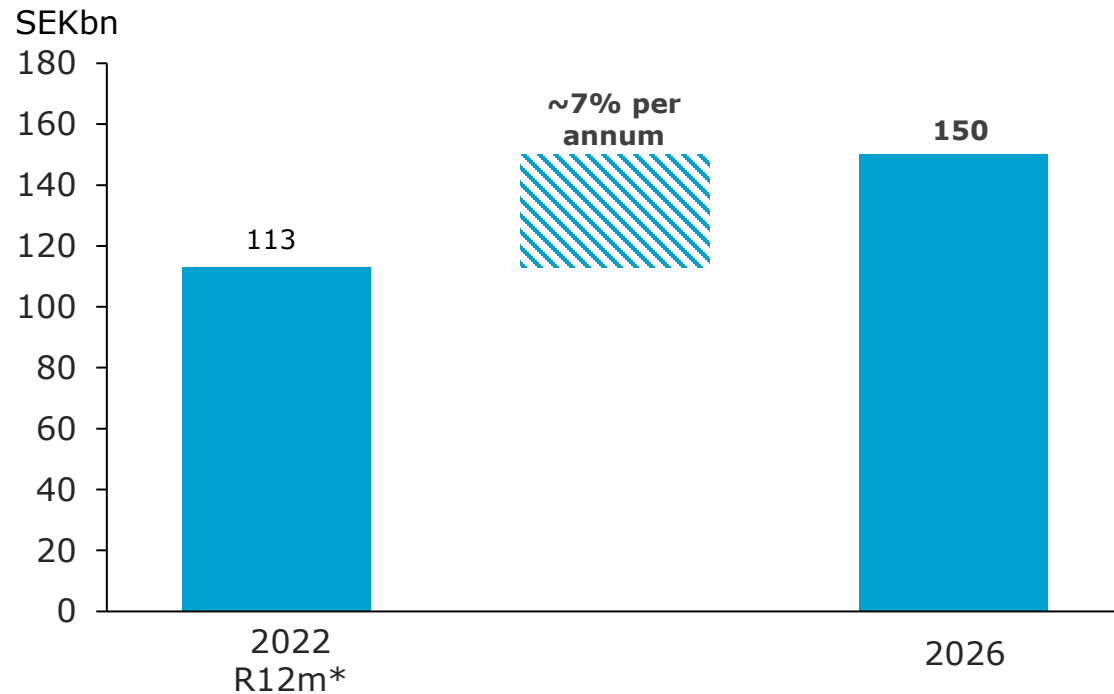
EBIT-margin over a
business cycle

Reaching our goals is built on our strategic objectives and activities

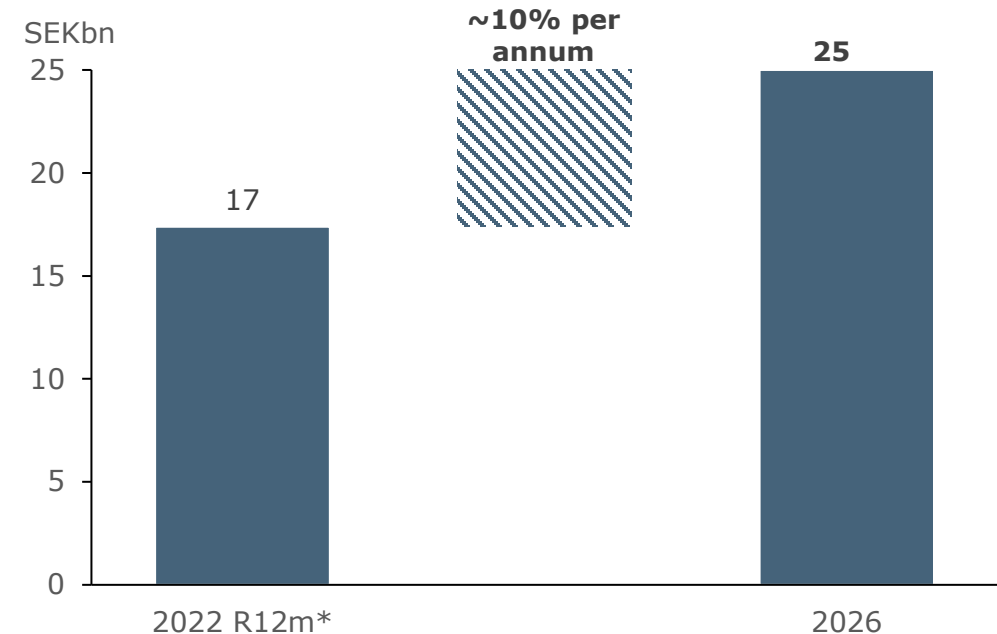


We are well on track to reach our financial targets

Sales need to increase by 33% to reach SEK 150 bn



...and operating profit by 44% to reach SEK 25bn



*) Note: As of 30 September

Key takeaways



Good industry

We are the market leader in an industry with strong fundamental growth drivers



Resilient business

Agile and flexible cost base supported by a decentralized operating model



Innovation

Increased innovation efforts to enable accelerated long-term profitable growth



A sustainable future

Sustainability is not only embedded in everything we do but also an important driver for profitable growth



People

A strong team: Our most important asset



Thank you