

Daikin

A global leader in heating and cooling solutions

Corporate Presentation, August 2024



100 years Daikin

Our history of innovation and groundbreaking ideas

100 Years of Daikin innovations

1924 ----- 1935 ----- 1938 ----- 1951 ----- 1958 ----- 1963 ----- 1967 ----- 1973 ----- 1982

Akira Yamada founded Osaka Kinzoku Kogyosho Ltd.



Fluorocarbon gas was produced for the first time in Japan



First refrigeration unit with fluorocarbon gas was delivered



"Mifujirator" – the first packaged air conditioner became a game-changer



1958 -----

Onset of Daikin's pioneering heat pump technology



1963 ----- 1967 -----

Large-scale production of commercial air conditioners commenced in Japan

Daikin's entry to Europe originated from the tiny island Malta

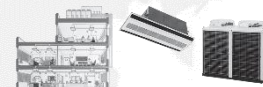


1973 -----

Daikin Europe N. V. opened a 5,000 m² assembly plant in Ostend, Belgium

1982 -----

World's first VRV unit was launched in Japan



2016 -----

Expansion of our refrigeration portfolio through acquisitions



2014 -----

McQuay Italia has become Daikin Applied Europe

2013 -----

Launch of the 'Ururu Sarara Bluevolution' air-to-air heat pump integrating A+++ HVAC & fresh-air systems

2009 -----

Daikin was the first manufacturer to receive an eco-label for a heat pump, the Daikin Altherma LT

2006 -----

Full entry to the heating market with the launch of the first generation of Daikin Altherma



2004 -----

Expansion of production in Europe



1999 -----

Daikin Central Europe was founded to expand into the fast growing CE-region

1997 -----

World's first mass production of refrigerant R-32



Launch of the revolutionary swing compressor

1993 -----

First online diagnostic system for installed Daikin units available 24/7 was launched in Japan



2017 -----

"Stand by me," Daikin's first consumer portal, was launched



2018 -----

The first of many Daikin B2C Experience centers (flagship stores) has opened in Vienna



2019 -----

Circular economy Loop by Daikin

2020 -----

ROTEX Güglingen has become Daikin Manufacturing Germany

2021 -----

Your Daikin World, Daikin's first B2B Experience center has opened in Vienna



2022 -----

Highest turnover of Daikin Industries Ltd. in the company's history



2023 -----

Japanese groundbreaking ceremony for Europe's largest heat pump factory in Poland



2024 -----

Thank you for choosing Daikin. Let's shape the future of heating and cooling together.



Mission

“Air is essential to our existence.
We use the **power of air to bring
low carbon heating and cooling
solutions** world-wide.”



Core values

Absolute
credibility

Enterprising
management

Harmonious
personal
relations

**Continuously
develop our
company**

Daikin group – globally

Daikin Industries, Ltd. in numbers

Daikin in numbers*

A global leader in heating, cooling, ventilation, air purification and refrigeration innovations



28.00 billion euro global turnover – best result ever in Daikin's 100-year history (4,395.3 billion yen)*



100 years of innovation

Founded 1924 in Osaka, Japan
Since 1982 **Daikin Industries Ltd.** – Global Daikin Group
Since 1973 **Daikin Europe N. V.** – Headquarters EMEA Region
Since 1999 **Daikin Airconditioning Central Europe** – Headquarters CE-region

*Fiscal year 2023 (April 2023 - March 2024)

** BRG BUILDING SOLUTIONS – June 2024 data / report



Operative in **175 countries** worldwide
with **98,000 employees**



125 production bases worldwide
14 out of them in Europe and the Middle East



5,800,000 units manufactured per year
in the EMEA-region for sustainable heating, cooling, ventilation and refrigeration



Over **1,300,000 hydronic heat pumps**
installed across Europe since 2006 making us
the **n°1 manufacturer****



53 R&D centers worldwide including
1 EMEA Development center in Ghent,
Belgium, as global R&D headquarters for
sustainable heating and cold chain solutions

Factbox*

Daikin Industries, Ltd.

Founded 1924

www.daikin.com
[100 Years Daikin](#)

Global
n°1
Air conditioning company**

Active in
175
countries world-wide

Head office
Osaka
Japan

Turnover*
28.0
billion euro

Production bases
125
world-wide

Employees
98,000
world-wide

Research
53
R&D centers world-wide

100
years of innovation
world-wide

50
years of innovation
in Europe

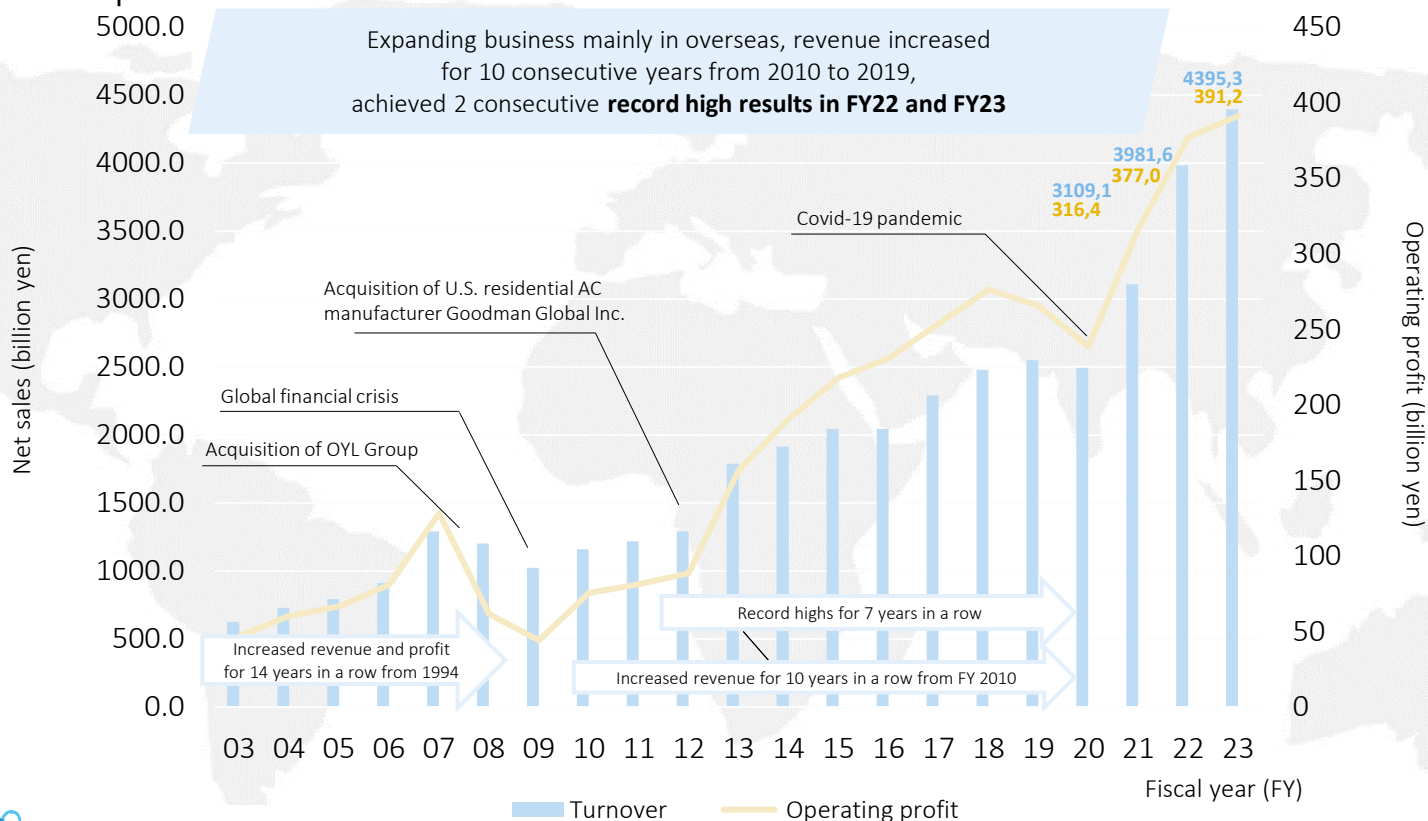
*Fiscal year 2023 (April 2023 - March 2024)

**Fuji Keizai Co., Ltd. "Global Home Appliance Market 2024"

(Ranking of Equipment Sales for Global AC Manufacturers [FY 2022 Results])

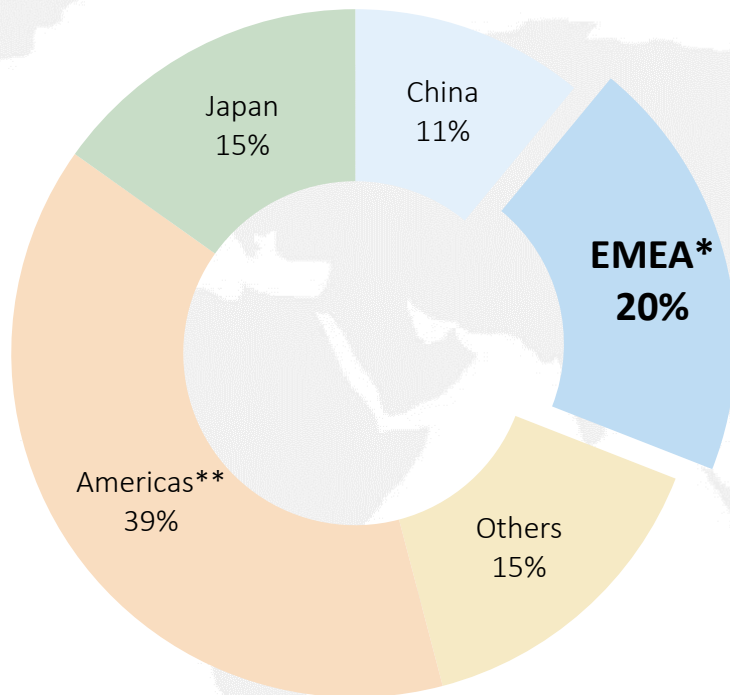
Daikin Industries, Ltd.

Financial roadmap since 2003



Daikin Industries, Ltd.

Sales per region

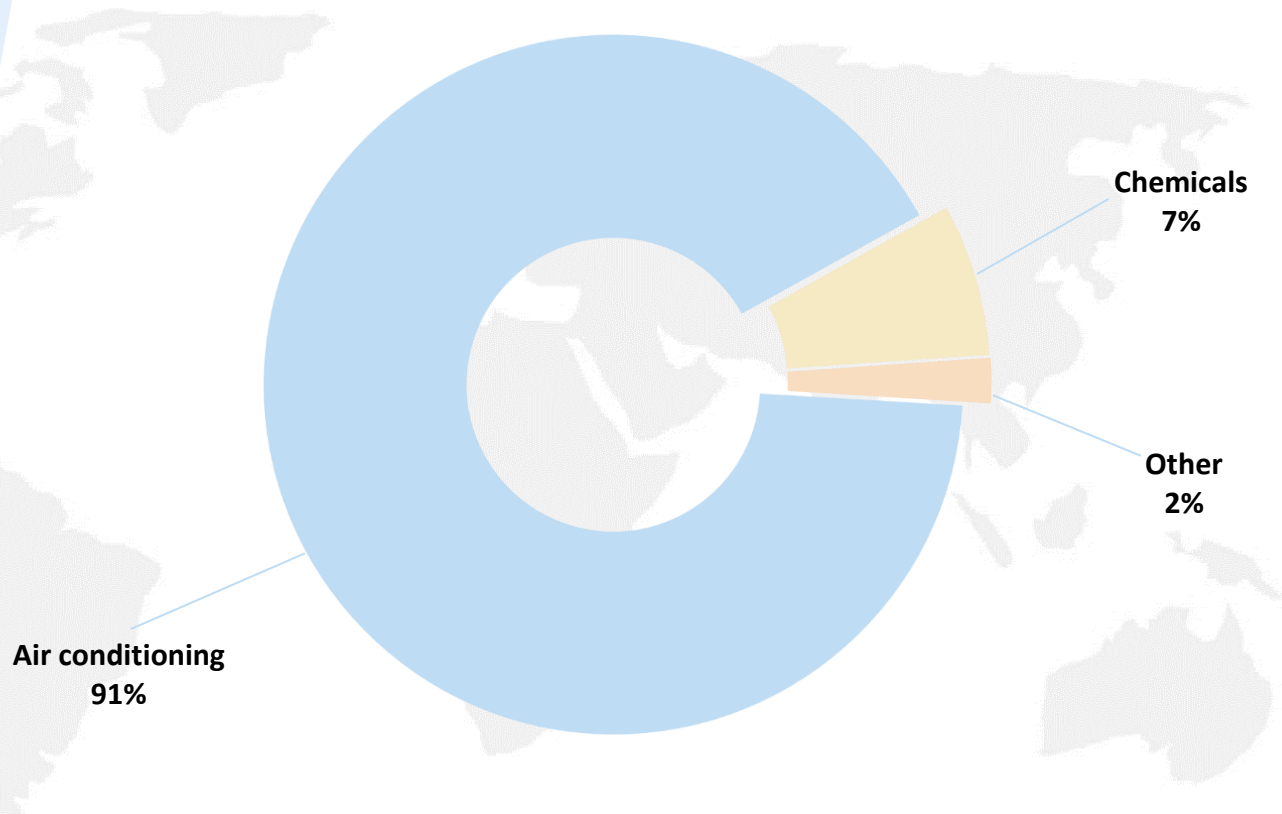


* Europe, Middle East, Africa

** North & South

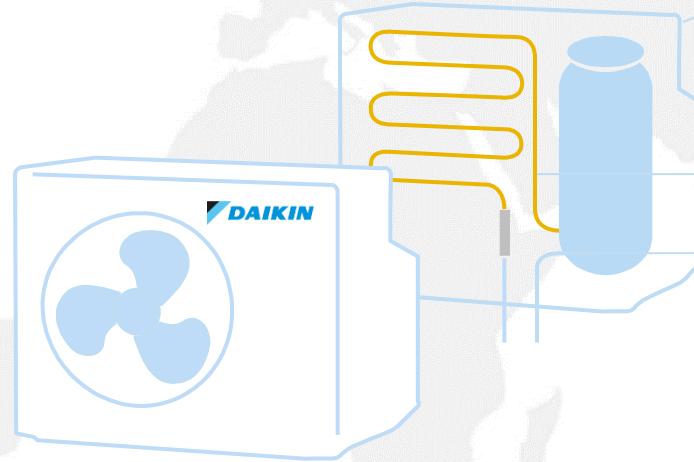
Daikin Industries, Ltd.

Sales with regards
to Daikin
technologies



Daikin Industries, Ltd.

In-house development and manufacture make us unique in the HVAC-R industry



- **Units and systems** for direct and indirect temperature exchange
- **Refrigerants**
- **Compressors**

Daikin Industries, Ltd.

Making heating,
cooling,
ventilation and
refrigeration
carbon neutral

Heat pumps
absorbing and
moving heat
from the air

**Refrigerant
control**
for efficient
heat transport

**Core
technologies**
since 100 years

Inverter
contributing to
greater energy
savings and comfort

Daikin Europe group – EMEA-region

Daikin Europe N.V. in numbers

EMEA = Europe, Middle East, Africa

Factbox*

Daikin Europe N. V.

Founded 1973

Subsidiary of Daikin Industries, Ltd.

www.daikin.eu

[100 Years Daikin](#)

Turnover*

4.9
billion euro

Production bases

14
in Europe and the Middle East

Brands

5
Daikin, AHT, Zanotti,
Tewis, Hubbard

13
B2C Experience centers for
home owners and consumers

Active in

130
countries

Research

13
R&D centers

Production of

5,800,000
units per year

116
B2B Trainings centers

Head office

Ostend
Belgium

Employees

13,800
in production, sales and service

Since 2006

1,300,000
hydronic heat pumps sold in
Europe making us the n°1
manufacturer**

*Fiscal year 2023 (April 2023 - March 2024)

** BRG BUILDING SOLUTIONS – June 2024 data / report

HVAC-R = Heating, Ventilation, Airconditioning, Refrigeration

Daikin Europe N.V.

14

HVAC-R production bases

including

12 in Europe

2 in the Middle East

+ 1 Heat pump factory
opening end of 2024



HVAC-R = Heating, Ventilation, Airconditioning, Refrigeration

Daikin Europe N.V.

14

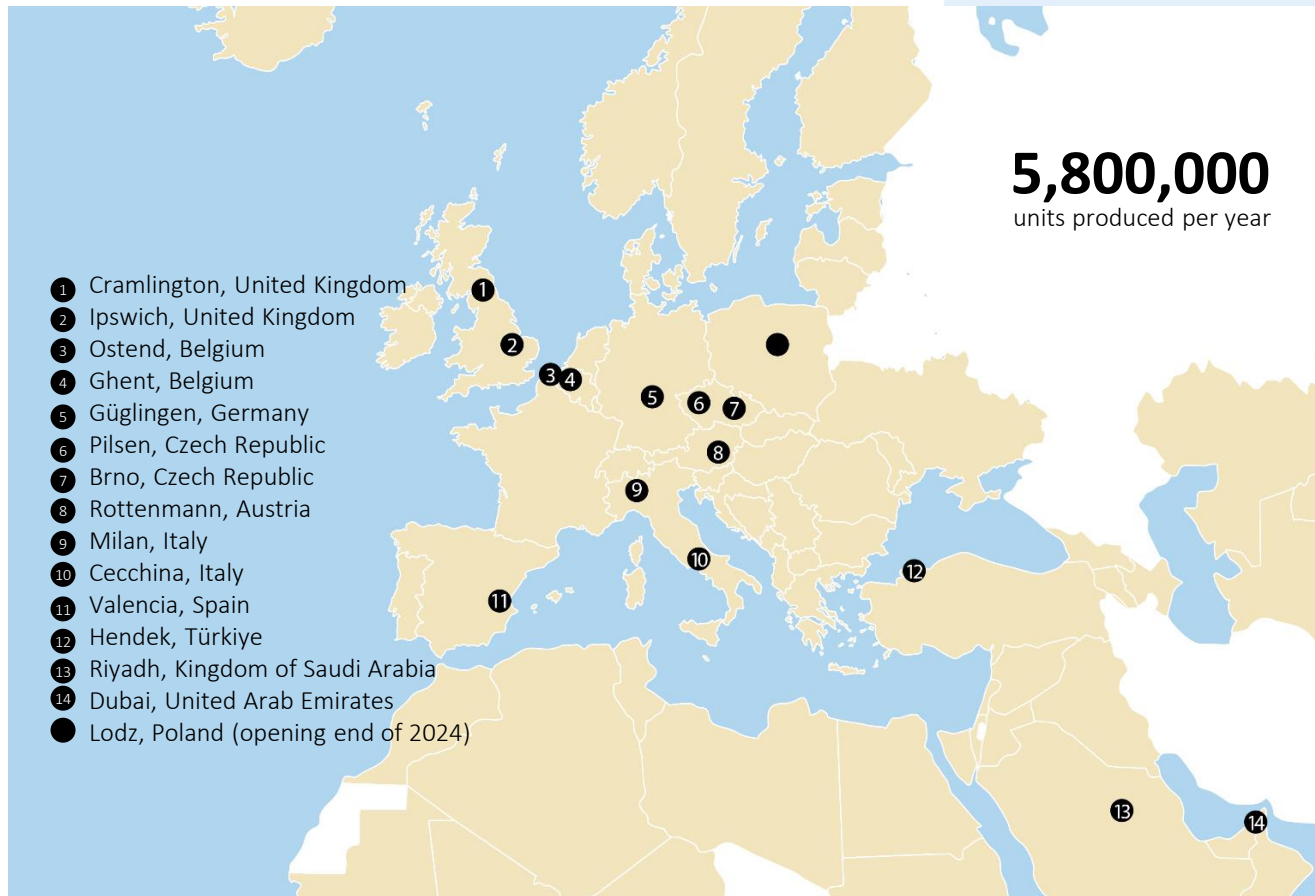
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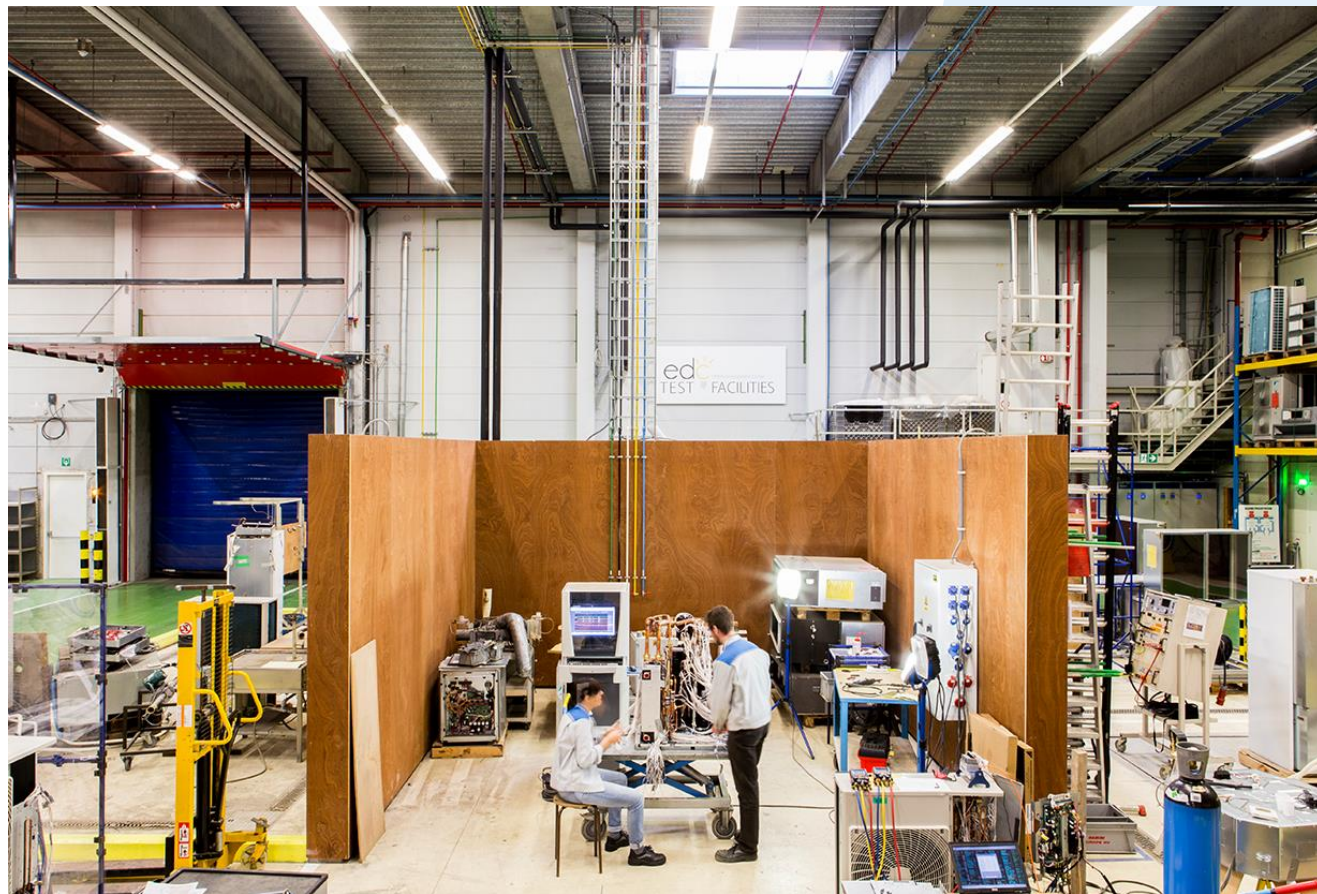
Daikin Europe N.V.

13

R&D centers

including

1 EMEA Development Center
in Ghent, Belgium, as global
R&D headquarters for
sustainable heating and cold
chain solutions



Daikin Europe N.V.

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R&D centers

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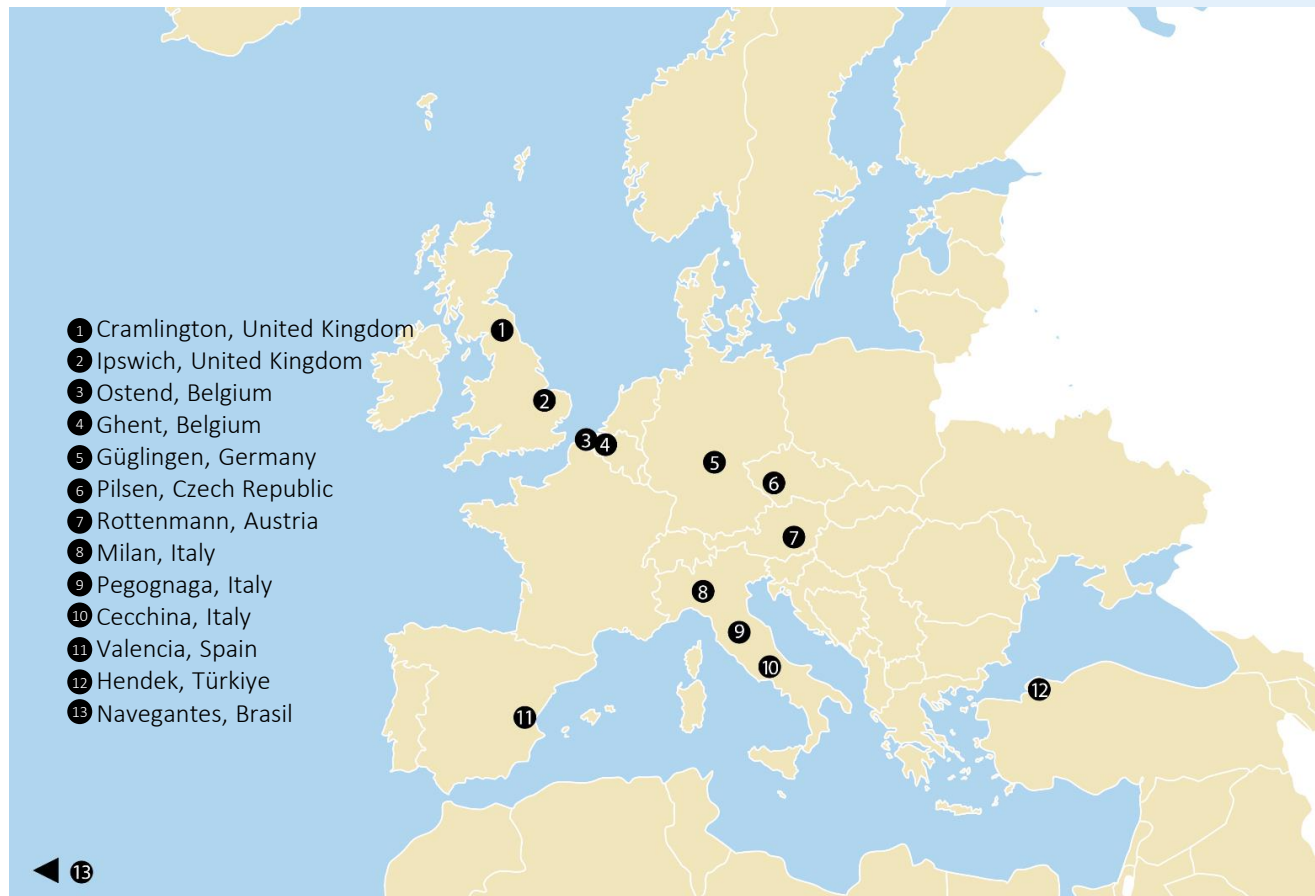
Daikin Europe N.V.

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R&D centers

including

1 EMEA Development Center in Ghent, Belgium, as global R&D headquarters for sustainable heating and cold chain solutions



Daikin Europe N.V.

116

Training centres in the EMEA-region

10 out of them located in the Daikin Central Europe region



Daikin Europe N.V.

116

Training centres in the EMEA-region

10 out of them located in the Daikin Central Europe region



▼ Senegal (1)

▼ Nigeria (2)

▼ South Africa (3)

Daikin Europe N.V.

13

B2C Experience centers for homeowners and consumers in Europe

4 out of them located in the CE-region (Vienna, Bratislava, Budapest, Belgrade) called Flagship stores



Daikin Europe N.V.

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B2C Experience centers for homeowners and consumers in Europe

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Daikin Europe N.V.

EMEA sales locations

25

Head offices

5 Sales offices



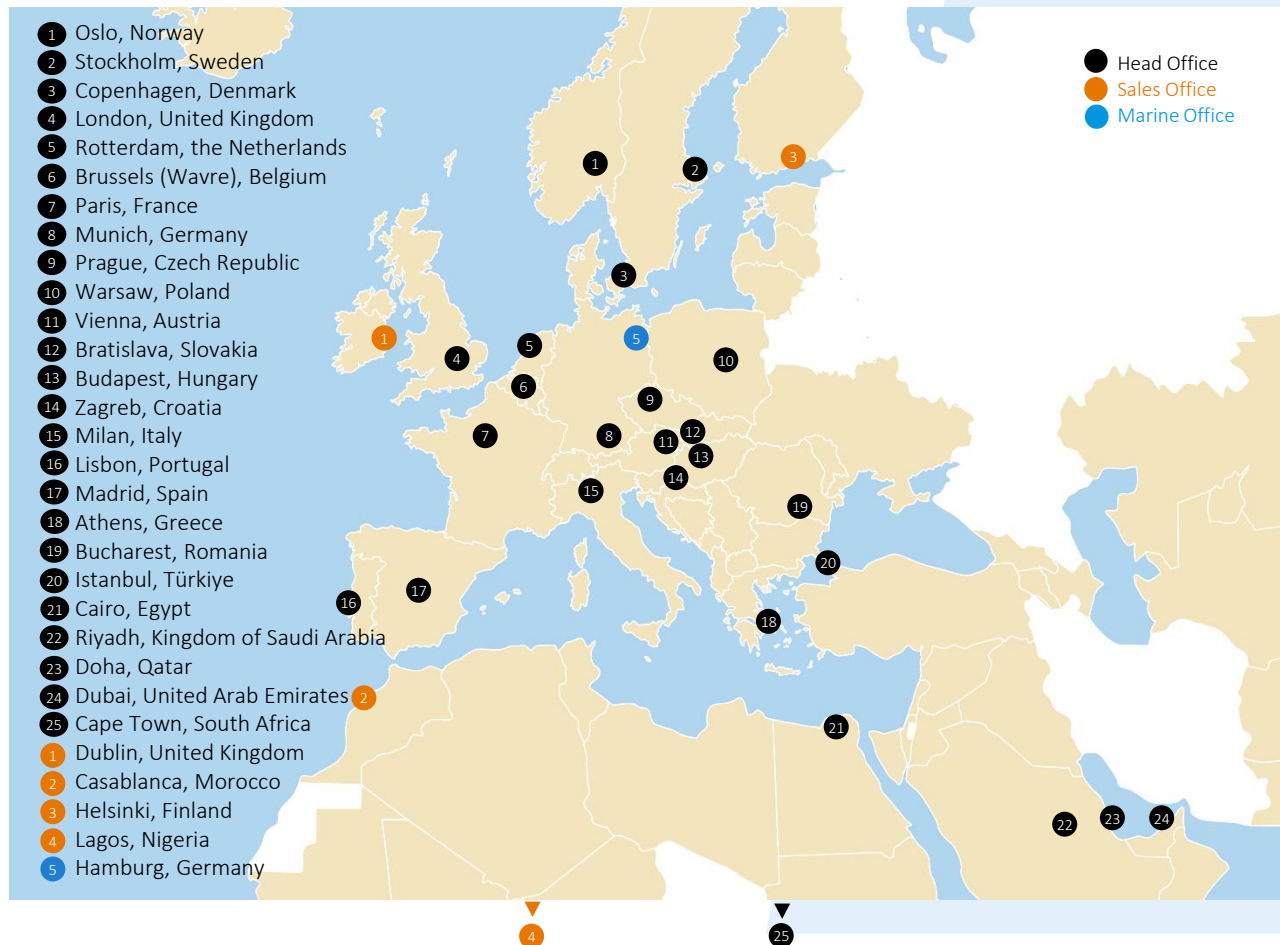
Daikin Europe N.V.

EMEA sales locations

25

Head offices

5 Sales offices



Daikin Europe N.V.

Financial roadmap since 2013



Daikin Central Europe

16 markets in Central and Eastern Europe

Factbox*

Daikin Central Europe

Founded 1999

Daikin Airconditioning Central Europe

HandelsGmbH

Subsidiary of Daikin Europe N. V.

www.daikin-ce.com

[100 Years Daikin](#)

*Fiscal year 2023 (April 2023 - March 2024)

HVAC-R = Heating, Ventilation, Air Conditioning, Refrigeration



Active in

16
countries

Diversity

9 + 7
EU and non-EU member states

Rewards

3
times in a row
Kununu Top Company



Employees

700
in sales and service

Brands

5
Daikin, AHT, Zanotti,
Tewis, Hubbard

4
B2C Experience centers /
flagship stores for
homeowners and consumers

Head office

Vienna
Austria

Network of over

3,400
partners
in the CE-region

2
B2B Experience centers for the
HVAC-R and construction industry


10
B2B Trainings centers out of
116 in the EMEA-region

Daikin Central Europe

Sales and service locations

 **1 Daikin Central Europe headquarters** comprising 16 markets


12 local sales and service offices


 **3 Daikin sales agents** (Serbia/Montenegro, Slovenia, Albania/North Macedonia/Kosovo)

 **2 Daikin warehouses** (Austria, Bulgaria)

 **2 B2B Experience centers**

- “Your Daikin World” in Vienna
- “Daikin Inspiration Park” in Warsaw

 **10 Daikin Trainings centers** and **1 Dual education program** at Dual Academy Bratislava

 **4 B2C Daikin Experience centers / Flagship stores** in Vienna, Budapest, Bratislava, Belgrade



Daikin partners – Driven by care

Daikin partners – driven by care

Mission



Daikin is a **leading provider** of **heating, cooling, ventilation, air purification, and refrigeration (HVAC-R) technology** for

- **residential,**
- **commercial,**
- **and industrial needs.**

By joining us, Daikin partners benefit from our extensive network of professionals dedicated to ensuring **people's comfort through energy-efficient installations and services** for over 100 years.

Daikin partners – driven by care

Mission



Today, it's time to say goodbye to fossil fuels. Europe aims to install 60 million more heat pumps by 2030, to boost energy independence and **decarbonize heating and cooling systems.**

Daikin partners – driven by care

Mission



We are determined to make a difference here by bringing **sustainable climate solutions for any type of buildings and requirements** to individuals and businesses.

Over **3,400 HVAC-R partners in the CE region** are already leading that **transition into the future** together with us. Their motivation in this:

Let's be driven by care.

Daikin partners – driven by care

6 reasons to join forces with Daikin



1

A market leader by your side

Join the world's n° 1 air-conditioning company* and Europe's leading hydronic heat pumps manufacturer**



2

Sustainable solutions

For year-round comfort, reliable infrastructure and decarbonization



3

In-house development and manufacture

Everything from one source:
Products, refrigerants and compressors

Daikin partners – driven by care

6 reasons to join forces with Daikin



4

Value for money

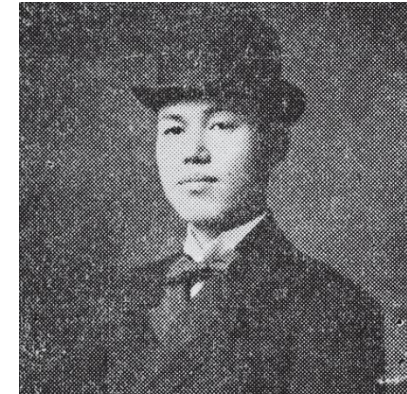
Because property owners greatly value energy savings achieved through efficiency control



5

Extensive product range in premium quality

To cater to all residential, commercial and industrial needs



6

100 years of innovation

Since 1924, Daikin evolved from a pioneer to a market leader in heating and cooling

Daikin partners – driven by care

Benefits for Daikin partners



Exclusive partner programs

- Special conditions and bonus for greater business success
- Marketing and sales promotions
- Partner events
- Learning opportunities



Customer support services

- Sales consultancy
- After-sales-service
- Technical customer support
- Spare parts
- Special warranties
- Remote monitoring, apps and a multitude of software tools
- One-Stop Shop Customer Portal



Quality assurance, safety and trainings

- Daikin Academy
- E-learning platform
- Product and service training
- 116 cutting-edge training centres
- Visits to Daikin Experience centres
- Visits to Daikin factories
- Unique competitions such as the Daikin Service Games

Daikin partners – driven by care

Daikin partner programs



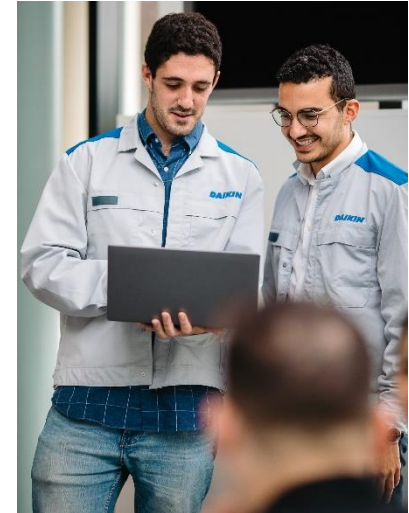
Home Comfort Experts

Support an excellent consumer experience with Daikin



Commercial Solutions Experts

Benefit from extra credibility that comes from working with a market leader

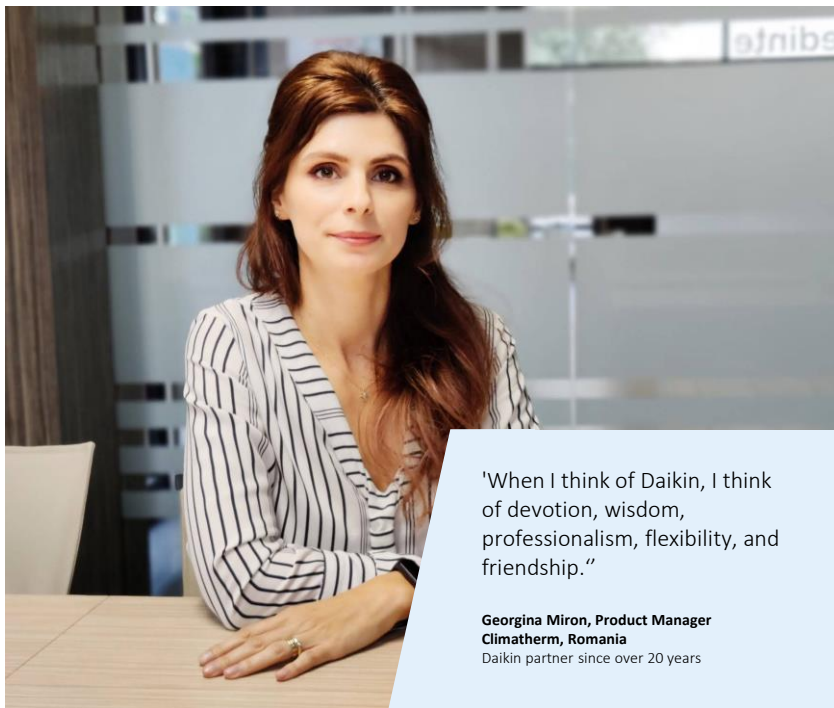


Service Partner Network

Develop your service capabilities for the best customer experience on the market

Daikin partners – driven by care

Partners about Daikin, more on [100 Years Daikin | Daikin \(daikin-ce.com\)](https://www.daikin-ce.com)



Daikin partners – driven by care

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“Our partnership with Daikin over the last 20 years resulted in stable and constant growth of our sales turnover - more than 300 times higher in 2022 compared to 2002.”

Vladimir Venkov, Executive Manager
MMC Inc EOOD, Bulgaria
Daikin partner since 2002



“We were assured of high-quality Japanese products and exceptional service.”

Mirowski Marcin, Owner
Elektro-Bud Pro, Poland
Daikin partner since 2002

Working at Daikin

Working at Daikin

What you find with us



A **global group**, where all employees are **on a first-name basis** across all hierarchies



A **market leader** in heating and cooling with **100 years of Japanese excellence** and **50 years of presence in Europe**



Rewarded **Top Company** by kununu 3 x in a row



A **fair employer** with international teams and a flexible work-life integration



A **dynamic and diverse working atmosphere** with numerous development opportunities for career growth, where your ideas matter

Visit www.daikin-ce.com