ZKB SWISS EQUITY CONFERENCE

Sensirion Holding

Martin Wirz, CFO

05 November 2025

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Sensirion uses certain key figures to measure its performance that are not defined by Swiss GAAP FER. These alternative performance measures may not be comparable to similarly titled measures presented by other companies. Additional information on these key figures can be found at www.sensirion.com/additional-performance-measures.

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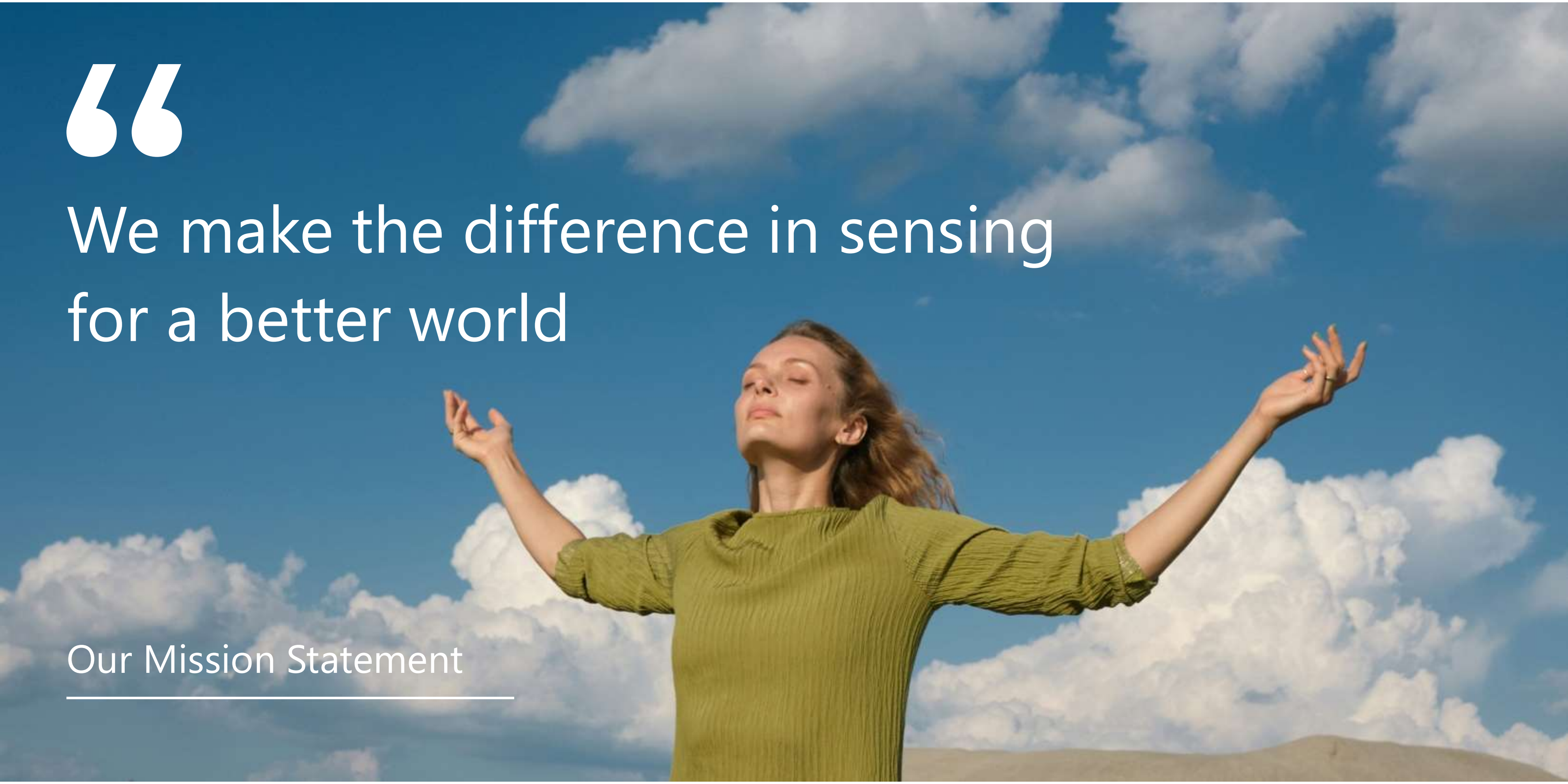


We make the difference in sensing for a better world

Our Mission Statement

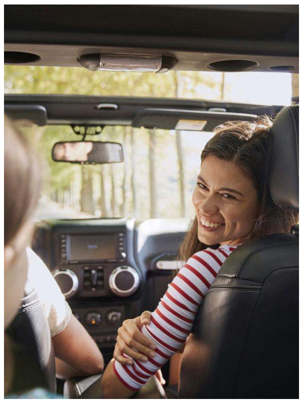
Sensirion supports you through the day

6 am > 7 am > 10 am > 6 pm > 11 pm

Breakfast at home

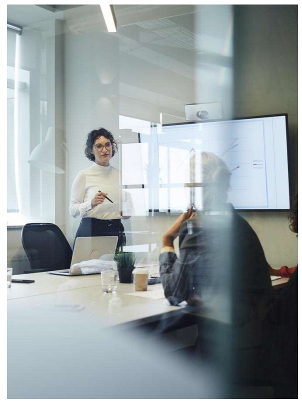
Energy optimization in the refrigerator

Commuting



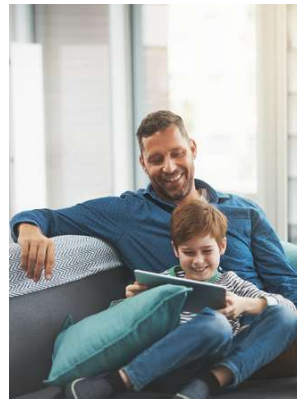
Car cabin air monitoring & car emission optimization

Work



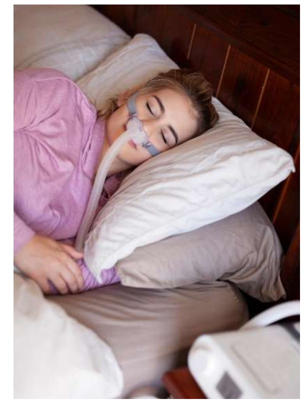
Optimized ventilation & Indoor Air Quality (CO_2)

Family time



Air Purifier
Heating system

Sleeping



CPAP-devices for sleep apnoe patients

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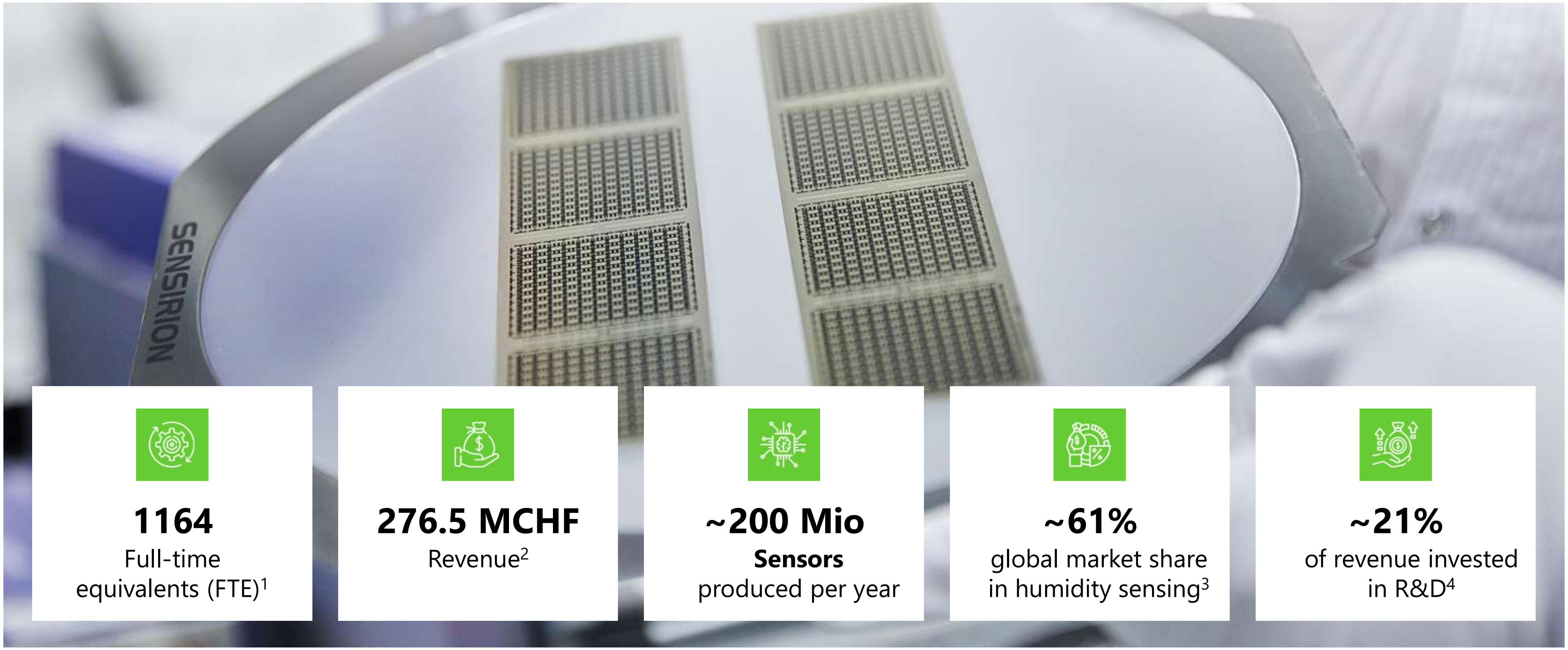
Sensirion at a glance



1164
Full-time equivalents (FTE)[1]

276.5 MCHF
Revenue[2]

~200 Mio
Sensors produced per year

~61%
global market share in humidity sensing[3]

~21%
of revenue invested in R&D[4]

[1] As of Dec 31, 2024
[2] FY 2024
[3] Based on internal estimates
[4] Average 2018 – 2024

Our markets at a glance

Automotive

Industrial
Appliances / HVAC / Automation

Medical

Consumer

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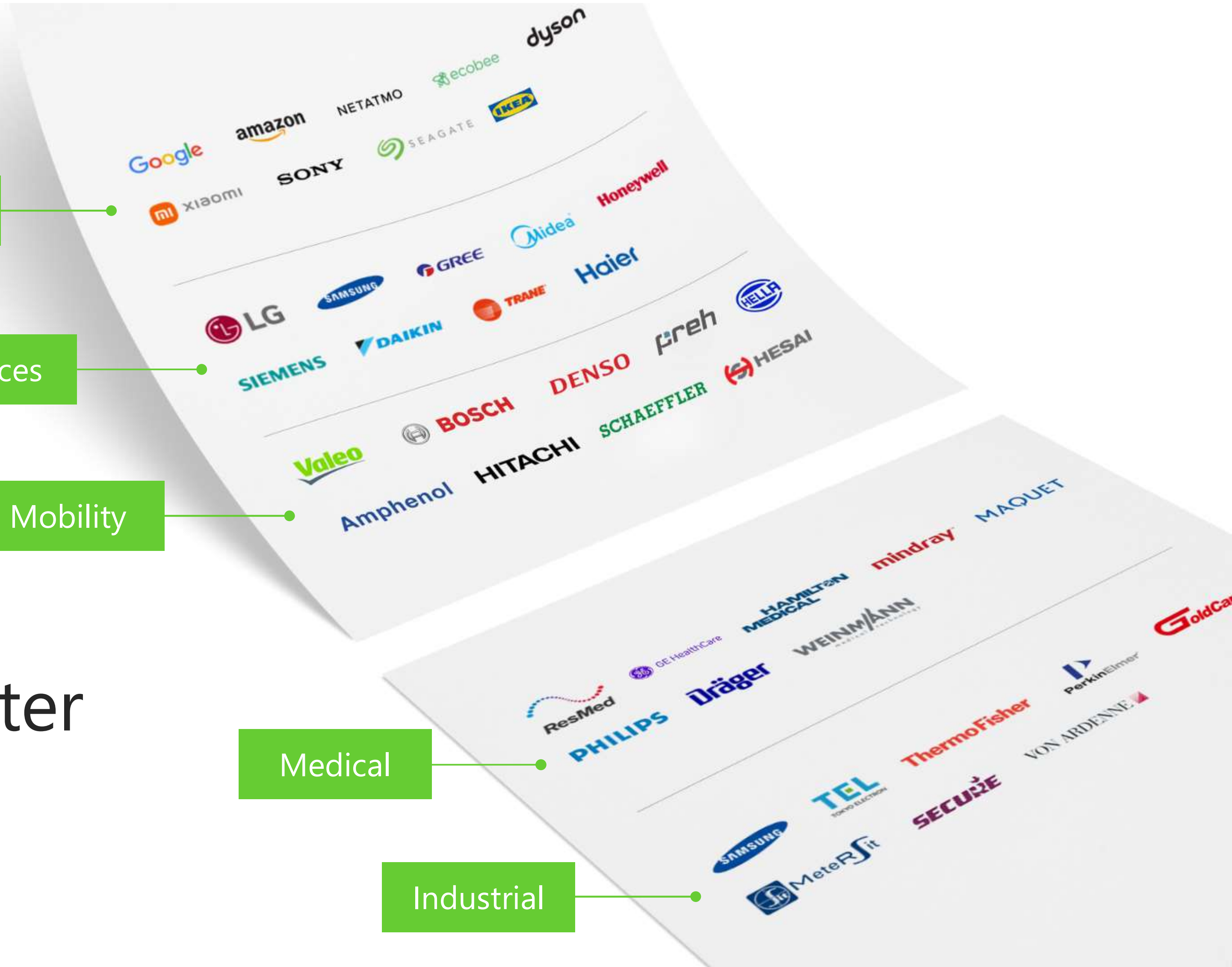
Consumer

HVAC / Appliances

Mobility



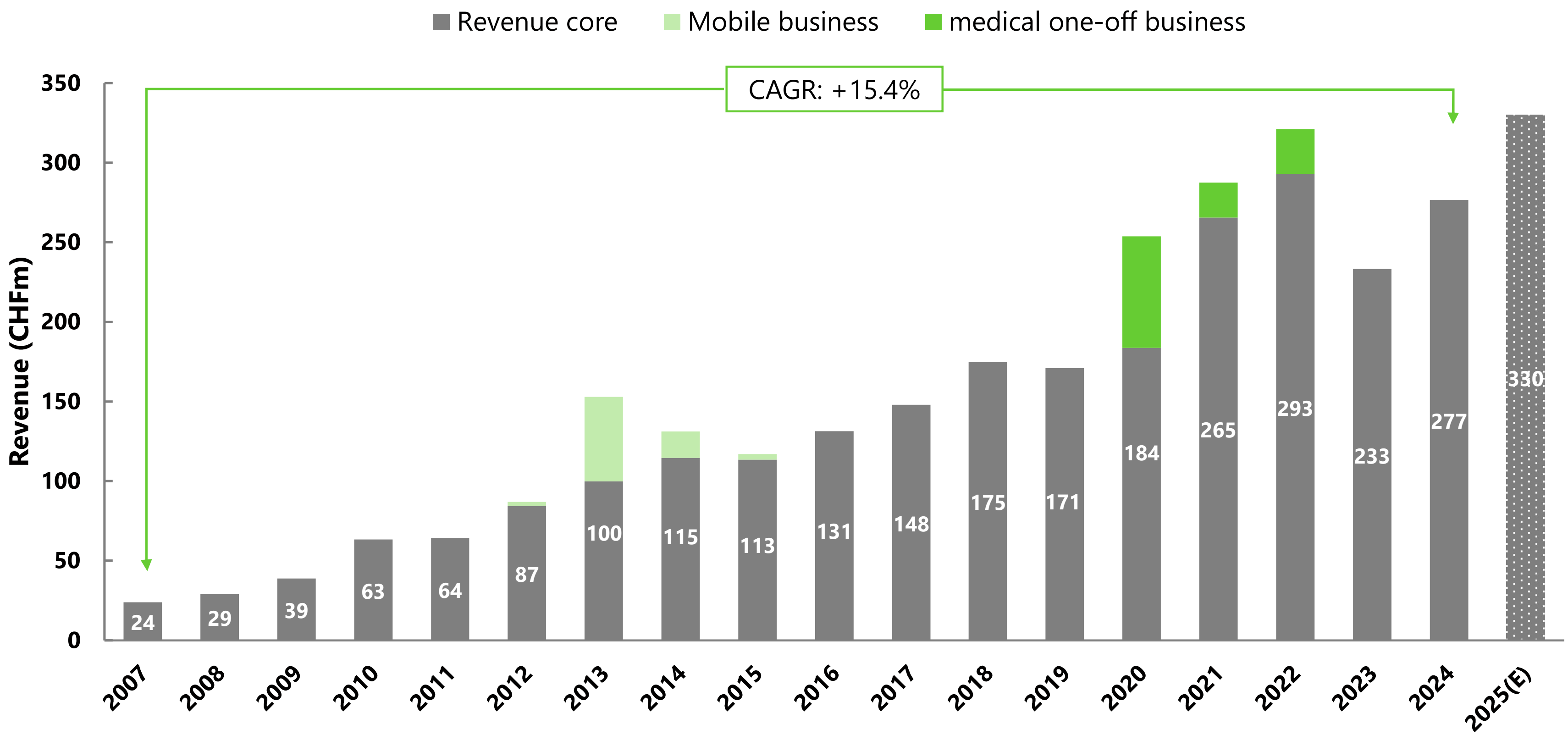
Medical

Industrial

OUR CUSTOMERS

create a better world ...

Strong continuous growth based on innovation



Expectations for 2025 on the midpoint (330 MCHF) of the forward-looking guidance revenue in the range of 320-340 MCHF

Confidential

SENSIRION

Leading the Future of Gas Measurements

Powering a Safer, Healthier, and More Sustainable World

leaders in gas
measurements

Offering exceptional
products

Mastering manufacturing
excellence, at scale

Recognized as a
trusted partner

We Measure Gases

Powering a Safer, Healthier, and Sustainable World

Strategic focus 3

Strategic focus 2

Strategic focus 1

Foundation

Own the Core in Gas Measurement

Leading the market in environmental and flow sensing

"SensiSpirit"

Unique culture of innovation and entrepreneurship

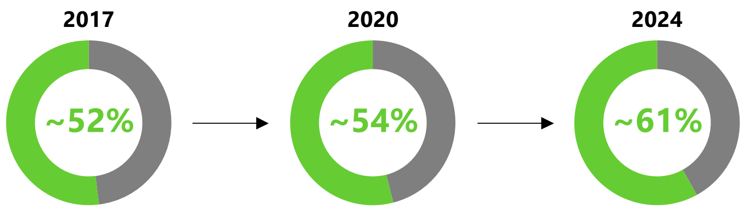
Humidity sensing

Gaining market share in a growing market

Market

- Dominating the humidity market due to long-lasting customer relationships with all major players
- Consolidating market as competitors (e.g. ST, Denso, Alps, etc.) exiting the humidity market

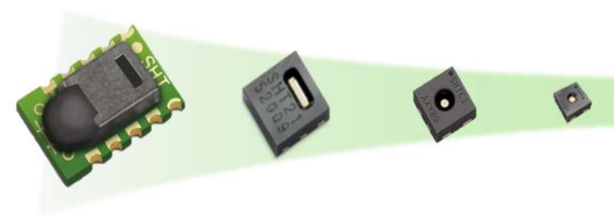
Sensirion's global RHT market share



Continuous innovation

- 70% smaller sensor volume optimizes costs and raises market entry barriers
- Top performance and cost efficiency open new applications in elastic markets

Evolution of humidity generations



Differential Pressure

Particulate matter

CO_2 Sensing

Environmental combo for PM, RH/T, VOC, NOx

PIONEER in sensor miniaturization

We Measure Gases

Powering a Safer, Healthier, and Sustainable World

Strategic focus 3

Strategic focus 2

Strategic focus 1

Foundation

Expand Horizons in Gas Measurement

Pioneering new applications with intelligent leak detection, advanced medical solutions, and smart industrial applications.

Own the Core in Gas Measurement

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leaders in gas measurements

Offering exceptional products

Mastering manufacturing excellence, at scale

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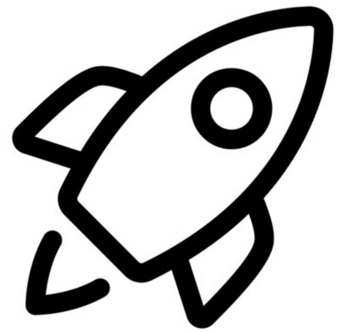


our next strategic priorities in gas measurements:

- Leakage Detection of Critical Gases
- Medical Breath Analysis
- Industrial Solutions

Refrigerant leakage sensors (A2L)

for HVAC Systems

Market drivers

- USA: Transition to lower GWP refrigerants (A2L) driven by **regulation, requiring sensor-based leakage detection**

Competition

- Sensor requires certification leading to entry barrier
- 3 main players: Sensirion, Sensata (US), Cubic (CN)

Addressable market

- US market only, 110 - 140 MCHF/y

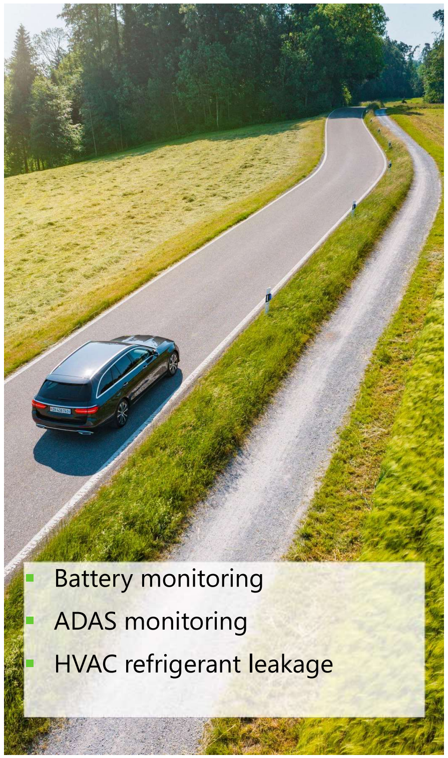
Sensirion's position

- **A2L Sensor Markt leader with biggest market share, serving key HVAC accounts**
- **Stable market** with upside potential by winning market share and overall HVAC market growth

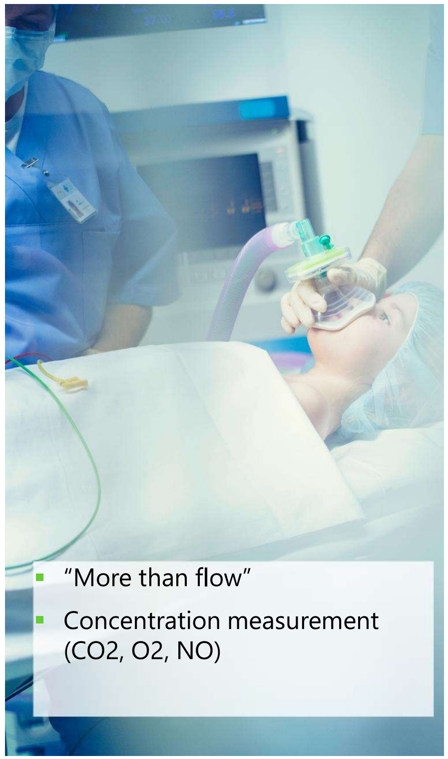
Our value proposition

- Technology ownership
- Integrated component allows for flexibility
- Application expertise & customer intimacy

Growth opportunities across all market segments & regions



- Battery monitoring
- ADAS monitoring
- HVAC refrigerant leakage



- "More than flow"
- Concentration measurement (CO_2, O_2, NO)

- Low-power, compact CO_2 sensor
- Next-gen Formaldehyde sensors

- HVAC leakage sensors for other refrigerants (A3 / Propane, CO_2)

We Measure Gases

Powering a Safer, Healthier, and Sustainable World

Strategic focus 3	**Innovation leadership** Lay the technological foundation for long-term growth
Strategic focus 2	**Expand Horizons in Gas Measurement** Pioneering new applications with intelligent leak detection, advanced medical solutions, and smart industrial applications.
Strategic focus 1	**Own the Core in Gas Measurement** Leading the market in environmental and flow sensing
Foundation	**"SensiSpirit"** Unique culture of innovation and entrepreneurship

Summary “Strategic focus 3”

Lay the technological foundation for long-term growth

What we have achieved

Innovation is in our DNA: we embrace challenges, take calculated risks, and drive disruptive technological advancements.

We have a strong track record in the innovation of new technologies and the monetization of these technologies in all our markets.

We have a full pipeline of technology projects in different stages of maturity.

We have established an efficient and disciplined M&A process to support the strategic growth fields.

Outlook: We are well positioned

to drive innovation and technology developments to address future megatrends.

to secure long-term sustainable company growth.

Confirmed mid-term guidance for next cycle

We see **many promising additional business fields** in all three strategic foci

We maintain the innovation power with **lower R&D spending of 18-20%** (instead of 22-24%) due to the higher portion of module business

Higher module material content expected to **moderately dilute gross margin** (by a few percentage points)

As a result, we expect the average **EBITDA level** to remain stable in the **mid to high teens** over the next medium cycle.

(CHFm)	Avg 2020-2024 [3]	Mid-term [1]	Comments
Annual revenue growth rate (CAGR)	~12% [1,2]	**Low- to mid-teens %**	✓ Secular megatrends supports revenue growth ✓ **Sensirion aims to grow above market** by leveraging its leading technologies and new applications
EBITDA margin	~20% [4]	**Mid- to high-teens %**	✓ **R&D spending of 18-20% of revenue** to support long-term technology development ✓ We keep our conservative accounting principle to expense R&D spending almost fully

[1] At fixed foreign currency exchange rates; mid-term means "averaged target over cycle of 3-5 years" [2] Without (with) COVID-19-related ventilator business
[3] FY 2024 at mid-point of annual guidance [4] adjusted for AiSight one-off impairment and restructuring costs

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