SIKA CONCRETE SOLUTIONS ENABLE NEW WAYS OF CONSTRUCTION

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SIKA CAPITAL MARKETS DAY 2018
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1. SIKA’S PRESENCE IN THE US MARKET
SIKA’S PRESENCE IN THE US CONCRETE ADMIXTURES MARKET

USD1.5 billion
Total market value of concrete admixtures, colors, and fibers

15.5%
Sika’s average growth rate in the US admixtures market since 2014

5X
Since 2014, Sika growth is 5x greater than US concrete market growth

US cement consumption forecast

- 2016: 91.9 million metric tons
- 2017: 94.2 million metric tons
- 2018: 97.2 million metric tons
- 2019: 99.5 million metric tons
- 2020: 100.8 million metric tons
- 2021: 101.4 million metric tons

- Portland Cement

Total market value of concrete admixtures, colors, and fibers:
- 2016: 91.9
- 2017: 94.2
- 2018: 97.2
- 2019: 99.5
- 2020: 100.8
- 2021: 101.4
2. MEGACITY CHALLENGES AND OPPORTUNITIES
MEGACITIES
CHALLENGES AND OPPORTUNITIES

Construction in urban areas presents unique challenges

- High volume of traffic interrupts concrete delivery to job sites
- Bridge construction often requires concrete to be delivered by boat
- Challenges delivering concrete to underground subway tunnel projects
- Highly demanding concrete pumping requirements for high-rise buildings
- Significant labor shortage in the USA
With Sika ViscoFlow®-2020 Sika provides a unique solution for urban challenges

- Developed to extend the delivery and workability time of fresh concrete
- Allows longer transit times without compromising concrete properties
- Reduces concrete rejections due to traffic delays or challenging jobsite access
- Recent success story solving a ready-mix producer’s pumping problem in Chicago led to a new USD 2 million/year account
3. UNIQUE SIKA “CONCRETE SYSTEMS” APPROACH
UNIQUE SIKA “CONCRETE SYSTEMS” APPROACH
SOLUTIONS BEYOND A SINGLE PRODUCT

- Focus on the overall solution versus a single product
- Example: “Sika Slab Solutions”
  - Sikament®-475 for improved finishability
  - Sika Control® NS for shrinkage reduction
  - SikaFiber® Force for replacing steel reinforcement
  - Sika UltraCure™ for concrete curing
  - Sika Speed Plate®
- Reduces owner’s construction and maintenance lifecycle costs
- No other competitor has similar “system” solution
4. LEADING THE WAY WITH KEY PROJECTS
HIGH PROFILE OPPORTUNITIES
LEADING THE WAY ON MEGA PROJECTS IN 2018

Raiders Stadium – Las Vegas, Nevada
One Vanderbilt Tower – Manhattan, New York

Harbor Bridge – Corpus Christi, Texas
Facebook Data Center – Richmond, Virginia
5. MOBILE TECHNICAL UNIT PROFILE
SIKA MOBILE TECHNICAL UNIT
BRINGING THE LAB TO THE CUSTOMER

Sika Mobile Technical Unit
“Laboratory on wheels”

Value added tool for customers

- Unique solution offered only by Sika
- Direct on customer or project site
- Capable of performing over different 30 tests
- Competitive advantage to winning new accounts or projects
- Service beyond the products
THANK YOU FOR YOUR ATTENTION