SIKA’S MEGACITIES STRATEGY: AN INDUSTRY FIRST APPROACH TO MEGAPROJECTS & KEY ACCOUNTS

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SIKA CAPITAL MARKETS DAY 2018
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1. SIKA’S MEGACITIES STRATEGY
An estimated 55% of the world population lives in megacities.

Annually, infrastructure investment of USD 400 BN is needed in the USA to support population growth.
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- Manufacturing and distribution boom
- Transition from “Brick & Mortar” to eCommerce
- Investments in everything from Civil Infrastructure to Data Centers
A COMMITTED AND COMPREHENSIVE APPROACH
CROSS-SELLING AS SUCCESS FACTOR

- A SIKA LEGACY
  - Started this concept 10 years ago
  - Leverages a 600+ person sales force
  - Continues to evolve and remain agile to the market trends
A COMMITTED AND COMPREHENSIVE APPROACH
CROSS-SELLING AS SUCCESS FACTOR

- A SIKA LEGACY
  - Started this concept 10 years ago
  - Leverages a 600+ person sales force
  - Continues to evolve and remain agile to the market trends
- A SUSTAINABLE GROWTH STRATEGY
  - Now a critical part of the Sika culture
  - National every day marketing campaign
  - Investments in corporate CRM – Salesforce.com
  - Sales enablement
AN INDUSTRY FIRST STRATEGY
CROSS-SELLING AS SUCCESS FACTOR

- NATIONAL LEVEL
  - Vertical Market Managers
  - Targeting Growth Markets

US Construction Markets (USD billion)

*FMINET.COM

2018
2019
2020
AN INDUSTRY FIRST STRATEGY
CROSS-SELLING AS SUCCESS FACTOR

- NATIONAL LEVEL
  - Vertical Market Managers
  - Targeting Growth Markets

- LOCAL LEVEL
  - Building Envelope Specialists
  - Regional Cross-Selling Teams
AN INDUSTRY FIRST STRATEGY
CROSS-SELLING AS SUCCESS FACTOR

- NATIONAL/LOCAL LEVEL
  - Key Accounts/Key Projects
  - Cover the entire project life cycle
    - Planning/Design – Owner/Architects/Engineers
    - Bidding – General and Sub Contractors
    - Construction – General and Sub Contractors
    - Design/Build Projects – Owner/Architects/Engineers/General Contractor
2. MEGAPROJECTS
MEGAPROJECT
VOLVO MANUFACTURING, SOUTH CAROLINA

Project Description
Volvo automobile factory
1st U.S. based facility
Plant size: 800,000 sf (74,300 m²)
Plant expansion planned to double in size
to 1.6 million sf (148,600 m²)
Project value: USD 550 million

Project Position
Watertight concrete opened the door for
other Sika product opportunities -
established trust with the General
Contractors

Sika Products
Sika Admixtures, Flooring, Curing, Sika
Hydrotite Waterstop, Sikafloor®, X-Plug
MEGAPROJECT
RAIDERS STADIUM, LAS VEGAS, NEVADA

Project Description
Professional football stadium
Seating capacity: 65,000
Project value: USD 1.9 billion

Project Requirements
High performance and quality control, high temperature compatibility, ease and efficiency of installation

Sika Products
Sika Admixtures: Sika®Plastiment® XR, Sika®Plastocrete®-161, Sika®ViscoCrete®-2100, Stabilizer 4R; Sarnafil® Roofing

Sika Opportunities
Flooring, Liquid Applied Membranes, Sealants, Vertical Glass GG735, Traffic Coatings, Color Concrete
3. VALUE ADDED SOLUTIONS
VALUE ADDED SOLUTIONS

- MARKET-SPECIFIC SOLUTIONS TO CAPTURE MORE MARKET POTENTIAL
  - Contractor’s influence on product choices increased
  - Sika responds with industry-leading product solutions:
    - Cold weather and rain slows or completely stops construction
    - Sika cold-weather products extend the construction season
      - Sikaflex®-2c NS Arctic
      - Sika AnchorFix®-2 Arctic
    - Sikaflex®-1 A allows for application on green and wet concrete
THANK YOU FOR YOUR ATTENTION

PICTURE ABOVE: DALLAS COWBOYS STADIUM MEGAPROJECT FEATURING MANY SIKA PRODUCTS INCLUDING A SIKA SARNAFIL® ROOF