DRIVING GROWTH IN TARGET MARKET INDUSTRY

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SIKA CAPITAL MARKETS DAY 2018
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1. TARGET MARKET INDUSTRY
TARGET MARKET INDUSTRY
SERVING DIVERSE MARKETS

- FACADE, WINDOWS & DOOR
- TRANSPORTATION
- AUTO GLASS REPLACEMENT
- RENEWABLE ENERGY
- INDUSTRIAL ASSEMBLY
- BUILDING COMPONENTS
- COMMERCIAL & RESIDENTIAL GLAZING
- COMMERCIAL & LEISURE MARINE
TARGET MARKET INDUSTRY
SIX DRIVERS

- Process efficiency
- Lightweight
- Durability
- Design flexibility
- Safety
- Emissions
Congestion and air pollution are main challenges in big cities.

Many cities are investing in light-rail projects to bring commuters off the road or to link city centers with airports.

Total of 46 light-rail transit projects with length of 593 km and covering around 452 stations are planned to be developed in North America.

Sika supplying several rail-vehicle manufacturers in North America such as Bombardier, Alstom, Stadler, and Brookville.

Numerous e-bus prototypes being produced in the USA, but by far largest e-bus production in China.
2. AUTOMOTIVE AFTERMARKET
AUTOMOTIVE AFTERMARKET
CONSTANT GROWTH THROUGH INNOVATIVE SOLUTIONS

6% ANNUAL AVERAGE GROWTH 2014 - 2018

SINCE 2008 OVER
60 MILLION WINDSHIELDS REPLACED IN THE USA

1 OF 2 WINDSHIELDS IN THE USA ARE REPLACED USING SIKA ADHESIVES
AUTOMOTIVE AFTERMARKET
CHALLENGES IN AUTO GLASS REPLACEMENT

- Customers have liability concerns related to re-calibration of ADAS (Advanced Driver Assistance Systems) system after windshield replacement
- Consolidation of the wholesale and retail windshield repair market segment
- Next-generation technology will move to immediate safe drive-away time
AUTOMOTIVE AFTERMARKET
DRIVING INNOVATIONS TO MEET CHALLENGES OF INDUSTRY

- Pioneer of “No Shortcut to Safety” for over 15 years
- Unique solutions engineered to meet requirements in all climatic conditions
- Crash test for all products to ensure that FMVSS 212/208 requirements are met
- Wide range of safe drive-away times to meet customer service time requirements
- Optimized packaging solutions meeting market’s installation requirements
SikaTack® Safe30
THE NEXT GENERATION IN PUR DIRECT GLAZING ADHESIVES

- Initially engineered to meet the demand requirements of our largest customer
  - one technology for all regions of the country
- 30-minute safe drive-away time
- Non-conductive & all-in-one modulus
- One-step pre-treatment for glass
- Can be used from 0 – 120 °F
- Crash tested to exceed all federal requirements for FMVSS 212 / 208.
AUTOMOTIVE AFTERMARKET
POTENTIAL GROWTH OPPORTUNITIES FOR AUTO GLASS REPLACEMENT

- Penetrating the noninsurance paid auto glass replacement market segment
- Addition of complementary accessory products
- Optimization of premium product line to meet the glass replacement requirements for ADAS
- New Sika PowerCure® product range for automotive and commercial vehicle glass replacement
Sika PowerCure® FOR AUTOGLASS REPLACEMENT
CURED TO THE OEM LEVEL

Sika PowerCure® – High speed performance in every climate

- **FASTER CURING**
  Vehicle returned to its original condition within minutes

- **INSTANT CALIBRATION**
  Safety and distant control sensors

- **IMMEDIATE SAFE DRIVE AWAY TIME**
  No restrictions: speed limits, bumpy roads or car testing

- **INSTALLATION IN ANY CLIMATE**
  Delivers the same performance all year round

- **SOLVENT AND PVC FREE**
THANK YOU FOR YOUR ATTENTION