



SIKA CONCRETE SOLUTIONS ENABLE NEW WAYS OF CONSTRUCTION

KYLE LOYD, HEAD TARGET MARKET CONCRETE AND WATERPROOFING USA
SIKA CAPITAL MARKETS DAY 2018

BUILDING TRUST



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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

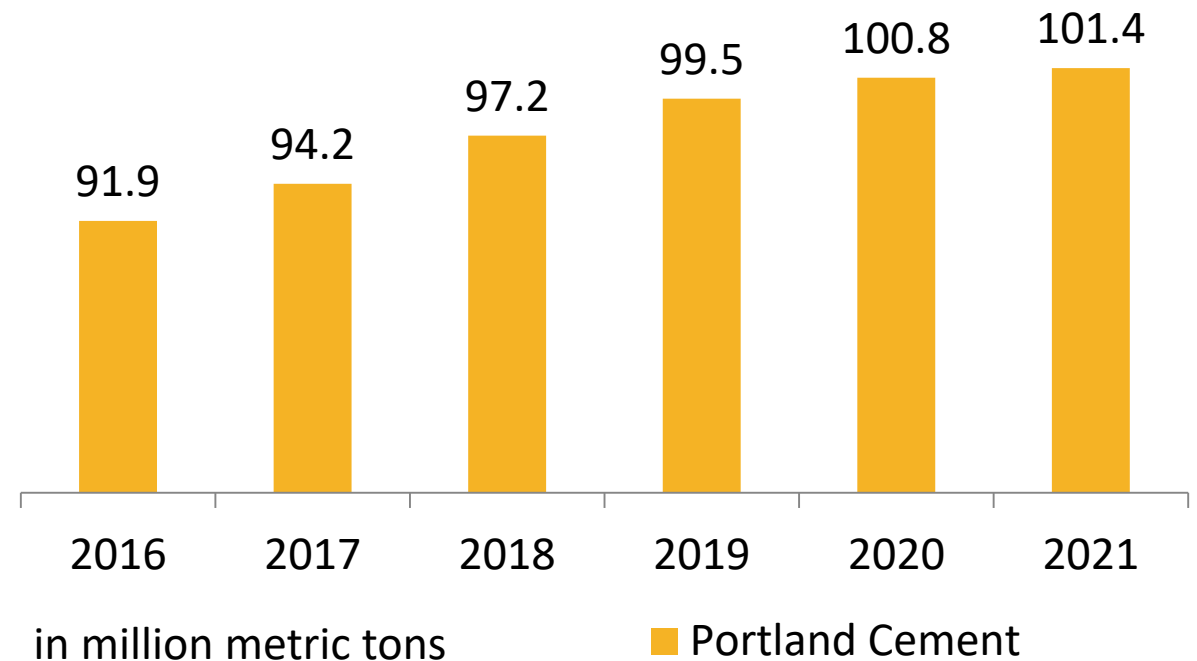
15.5%

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



2. MEGACITY CHALLENGES AND OPPORTUNITIES

MEGACITIES

CHALLENGES AND OPPORTUNITIES

Construction in urban areas presents unique challenges



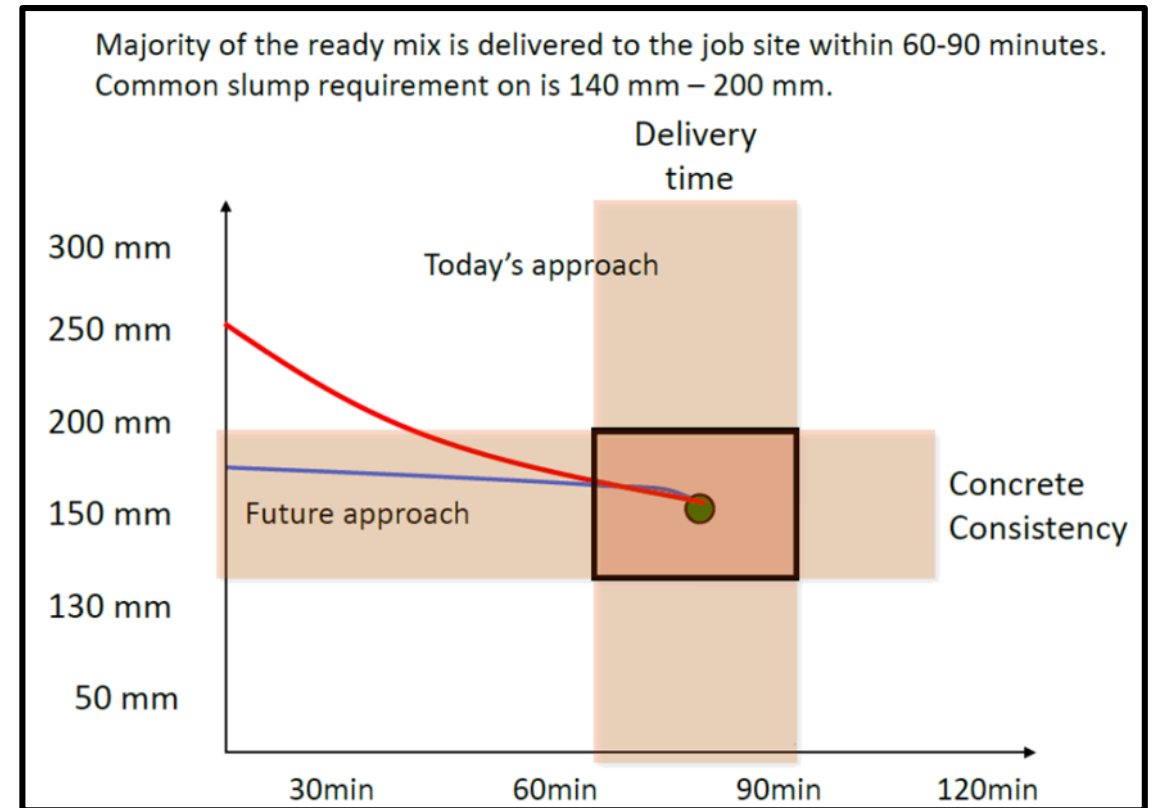
- High volume of traffic interrupts concrete delivery to job sites
- Bridge construction often requires concrete to be delivered by boat
- Challenges delivering concrete to underground subway tunnel projects
- Highly demanding concrete pumping requirements for high-rise buildings
- Significant labor shortage in the USA

MEGACITIES

CHALLENGES AND OPPORTUNITIES

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

CONCRETE
SIKA SOLUTIONS FOR SLAB-ON-GRADE & FLOORING APPLICATIONS

- Extended Joint Spacing
- Partial or Full Replacement of Conventional Reinforcement
- Reduced Construction Costs and Schedule
- Enhanced Concrete Surface Quality and Durability

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APPLICATIONS
approach, protect, seal, bond, repair products for use on concrete to increase strength and durability. With Sika products, you can achieve all project applications, in concrete and concrete alike. The

PRODUCING
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FORMATION:

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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

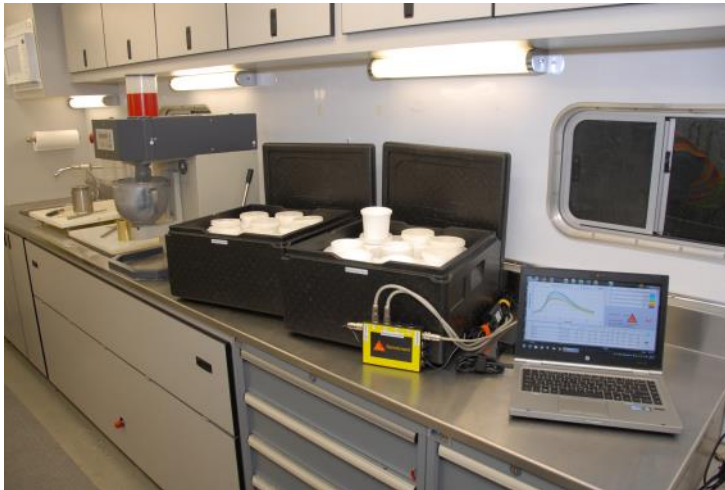
BRINGING THE LAB TO THE CUSTOMER



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