

MARCH 2020

The Saint-Gobain Group

ASTRONG GLOBAL GROUP

One of the top

100

industrial groups in the world with
around 1,000 manufacturing
facilities

Operating in

68

countries

Created more than

350

years ago



More than

170,000

employees and 100+
nationalities represented

About

4 000

sales outlets

2019 sales

€42.6BN



2019 GROUP FINANCIAL RESULTS

IN € billion (vs 2018)

42.6

Sales
+2.4%*

3.4

Operating income
+ 4.7%*

4.9

Ebitda
+4.8%

1.9

Recurring net income**
+10.0%

* Like-for-like

***Net attributable income excluding capital gains and losses on disposals, asset write-downs and material non-recurring provisions.



OUR MISSION

Saint-Gobain designs, manufactures and distributes materials and solutions which are key ingredients in the wellbeing of each of us and the future of all. They can be found everywhere in our living places and our daily life: in buildings, transportation, infrastructure and in many industrial applications. They provide comfort, performance and safety while addressing the challenges of sustainable construction, resource efficiency and climate change.





AN AMBITION ENCOMPASSING TODAY'S AND TOMORROW'S CHALLENGES

Comfort

To answer today's individual needs
(high-performance solutions for thermal comfort,
acoustics, indoor air quality, safety,
accessibility, aesthetics)



Sustainability

To address tomorrow's collective
challenges (sustainable building,
better mobility, resource efficiency,
demographic growth, climate change)



A PASSION FOR MATERIALS



**Innovative and
high-performance
materials**



**Materials for comfortable
and sustainable
buildings**



Expert employees



**Customer intimacy thanks
to our distribution brands**

AN AGILE, CUSTOMER-ORIENTED ORGANIZATION

4 consolidated regions

AMERICAS

SOUTHERN EUROPE,
MIDDLE EAST,
AFRICA

NORTHERN EUROPE

ASIA-PACIFIC

**In charge of regional markets,
particularly in habitat and
construction**

- Distribution of construction products
- Building Glass
- Insulation
- Plaster and plasterboard
- Ceilings
- Mortars
- Exterior products
- Pipe



1 global entity

HIGH PERFORMANCE SOLUTIONS

**In charge of worldwide industrial
markets**

- Mobility
- Life sciences
- Construction Industry
- Industry

A modern office hallway with large windows overlooking a city skyline. The hallway is bright and clean, with a white floor and ceiling. The windows are framed in white and provide a clear view of the city outside. The text "An ambitious strategy to support growth" is overlaid in orange on the right side of the image.

An ambitious strategy to support growth

MEGATRENDS

DIGITALIZATION

That impacts the way we live, buy, communicate and work

NEW MOBILITIES

Autonomous and electric vehicles

URBANIZATION

5 billion

people living in cities in 2030

RESOURCE SCARCITY & RECYCLING

+50%

Rising demand for raw materials by 2030

CLIMATE CHANGE

Buildings account for

40%

of the global greenhouse gas emissions

GLOBAL ECONOMIC GROWTH

that favors the emergence of middle class in emerging countries but deepens inequalities



INNOVATION MINDSET

3 700

researchers

8

cross-business
R&D centers

**1 product
out of 4** sold

by Saint-Gobain
today didn't exist 5
years ago

2018-19

**DERWENT
TOP 100
GLOBAL
INNOVATOR**

**Clarivate
Analytics**

NOVA
BY SAINT-GOBAIN

Nearly

400

patents filed each year

About

100

development units



SAINT-GOBAIN



**A STRONG BRAND THAT
INSPIRES END CUSTOMERS**



Makes employees proud and committed



Differentiates us from our competitors



Makes us attractive for future employees



DIGITAL AT THE HEART OF OUR DEVELOPMENT STRATEGY



DIGITAL CONSTRUCTION



INDUSTRY 4.0



**CUSTOMER EXPERIENCE
AND SERVICES**



NEW WAYS OF WORKING

#performance #efficiency #agility #customerintimacy #coconstruction

RESPONSES ADAPTED TO EACH CUSTOMER



Offer WELL-BEING to the end-user

- Answer the need for wellbeing in all living spaces
- The Multi Comfort approach
- An omnicanal, unified offer
- A reinforced Saint-Gobain brand



Being a key player in SUSTAINABLE DEVELOPMENT for all

- Sustainable solutions for habitat, health, mobility or industry
- A reduced environmental footprint



Improving construction professionals's PRODUCTIVITY

- Trainings
- Digital services
- Offsite construction
- BIM and digital construction
- Integrated production and supply chain



Supplying TAILOR-MADE PERFORMANCE AND INNOVATION to the industrial customer

- Flexible, automatised production thanks to industry 4.0
- Performance measurement
- Co-development

ACHIEVEMENTS THROUGHOUT THE WORLD



+ Netherlands

Saint-Gobain Weber partnered with Project Milestone, the world's first housing program based on 3D concrete printing.



+ India

Glazing, plasterboard and fiber-cement panels for the world's largest statue in India, 182 meters high, twice the size of the Statue of Liberty.



+ United States

CertainTeed roof shingles for the renovation of the Cincinnati Music Hall, one of the most beautiful and largest concert halls in the world.



+ Côte d'Ivoire

110km of pipelines to improve the quality of the water supply system for nearly 367,000 people.



+ China

146,000m² of Weber coating for the world's largest maritime bridge in China.



+ France

50,000m² of glass for the new Law Courts in Paris designed by the architect Renzo Piano.



+ France

All the ceilings of the new infrastructure at Lyon-Saint-Exupéry airport designed by Plafometal.



+ South Korea

Saint-Gobain supplied more than 100,000m² of insulating glass and glass solutions for Terminal 2 at Seoul Incheon International Airport.

INNOVATIVE SOLUTIONS FOR CONSTRUCTION AND RENOVATION



+ OVERLENGTH

The new range of glass with maximum dimensions of up to 18 meters by 3.21 meters, to meet architectural and construction trends.



+ XM Natura

First External Thermal Insulation System with 100% bio-sourced insulation.



+ The new glass wool

Eco-designed, with a bio-sourced binder, is efficient in terms of thermal and sound insulation.



+ SOLU+

Configurator providing services to professionals such as: detailed cost of the building sites, quotes and orders on line.



+ HABITO

Extremely strong plasterboard for easy attachment of objects to walls.



+ SageGlass Harmony

Glass that tints in shades, for the most natural connection with the outside world.



+ LeanWorks

Quick and efficient service proposed to completely take charge of the job-site logistics, from delivering materials to recovering waste, all of this in one return journey.



+ Homly You

Intermediation website connecting qualified trade professionals to private individuals with projects.

INNOVATION FOR INDUSTRIAL MARKETS



+ Radomes

The use of Wi-Fi on board aircraft thanks to Saint-Gobain radomes.



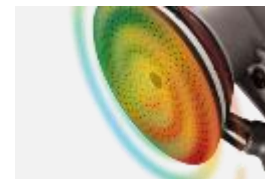
+ Jaguar E-Pace

Extruded acoustic, a-thermic and heated windscreen, head-up display system provided by Saint-Gobain.



+ Smart windshield

Saint-Gobain's glass expertise and that of its partner, Nuance, specialized in artificial intelligence, for a new driving experience.



+ NORTON Cyclonic Multi-Air

New range of abrasives with improved perforation configuration for a more efficient and consistent sanding cycle.



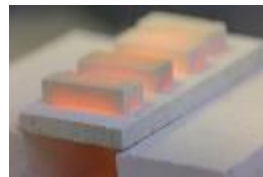
+ Biomedical solutions

Tailor-made single-use components and systems that contribute to the development of cell therapy.



+ GlasGrid

Anti-cracking fiberglass grid for reinforcing pavements and runways.



+ XILEX

A new refractory material that improves the performance of glass furnaces for the manufacture of new generation glass.



+ Airbus A350

Saint-Gobain is the exclusive supplier of cockpit windows for the entire Airbus A350 XWB long-haul range.



A Group
that reinvents
itself
*Transform
& Grow*

OUR TRANSFORM AND GROW PROGRAM

The main goal:
fully leverage Saint-Gobain's assets
to strengthen its competitiveness and unleash growth potential.



2 pillars

A new organization
by country and by market,
closer to our customers,
simpler and more agile,
integrating digital at all levels.

Agile and value-creating
portfolio management
of products and
services.



Customer intimacy



Digital transformation



Simplicity and agility

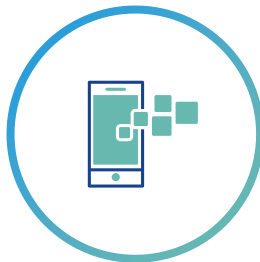
THE MAIN DRIVERS OF OUR TRANSFORMATION

BOOST OUR
COMPETITIVENESS
AND UNLEASH
GROWTH



CUSTOMER INTIMACY

- Develop our **customer-centricity**
- Use **Saint-Gobain solutions** across full portfolio



DIGITAL TRANSFORMATION

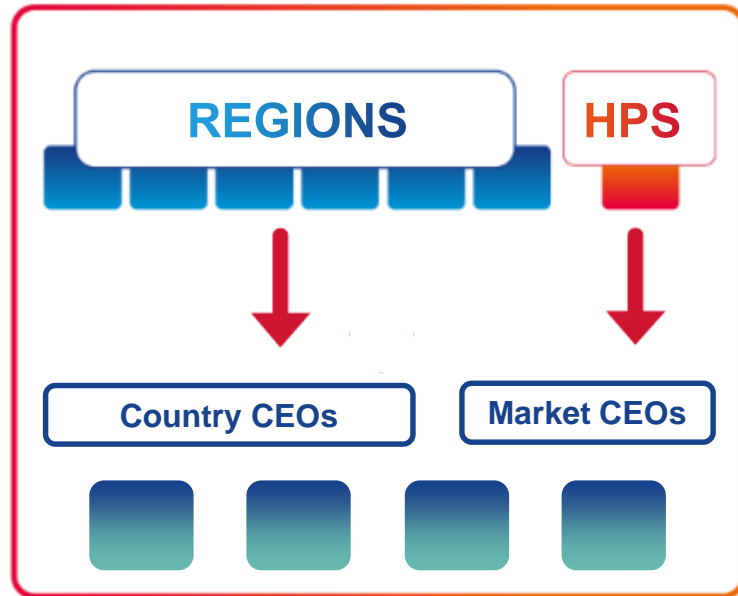
- Capture **new business models** and **value chain opportunities**
- Digitalize further our **operations & processes**



SIMPLICITY AND AGILITY

- Streamline **decision process**
- Empower and make **local teams accountable** in a clear organization


A PROFOUND TRANSFORMATION OF THE GROUP



← Agile

← Close to customers

← With Group expertise to support performance



**Strong values
to the benefit
of all our
stakeholders**

LEADERSHIP BY EXAMPLE

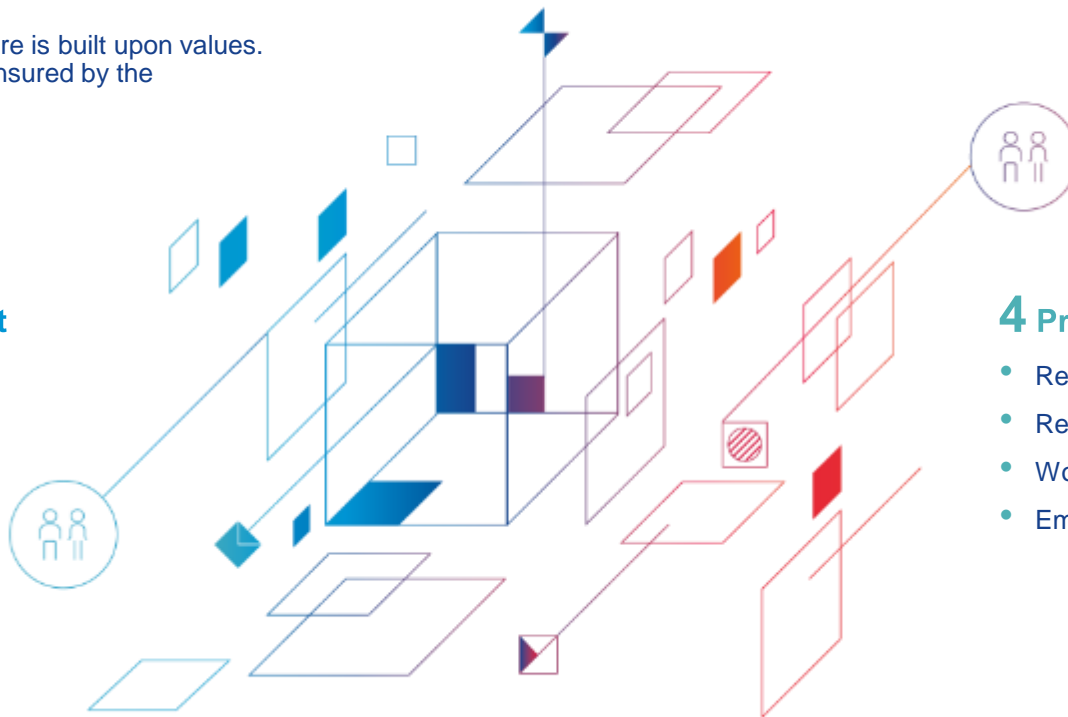
Saint-Gobain's corporate culture is built upon values. Their effective application is ensured by the compliance program.

5 Principles of conduct

- Professional commitment
- Respect for others
- Integrity
- Loyalty
- Solidarity

4 Principles of action

- Respect for the law
- Respect for the environment
- Worker health and safety
- Employee rights



RESPONSIBLE COMMITMENT AT THE HEART OF OUR ACTIONS

Business ethics

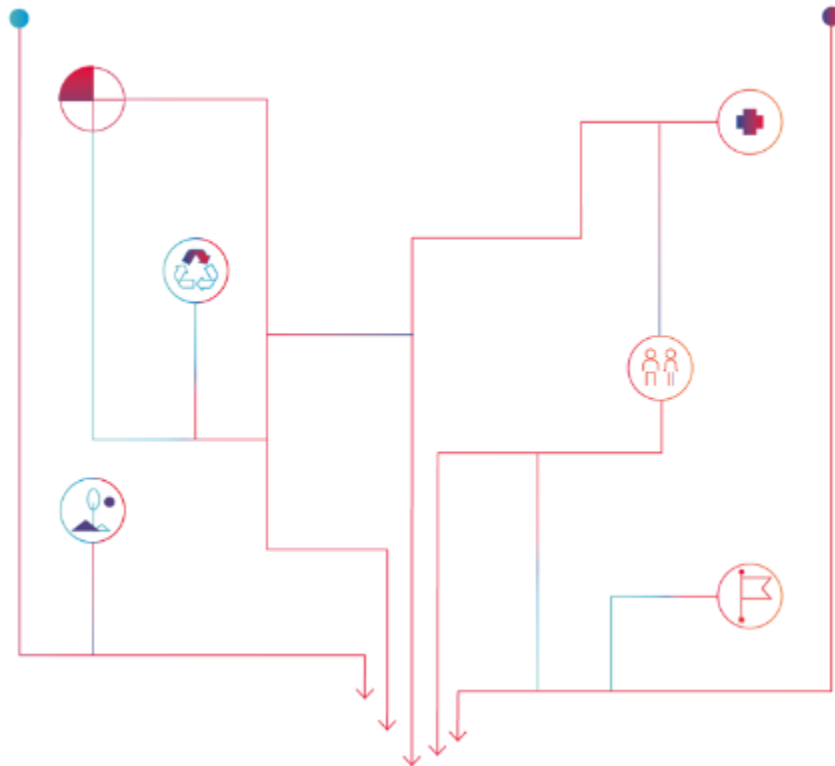
Build together over the long term thanks to our values

Circular economy

Change the way we design, produce and distribute our products and solutions to develop the circular economy

Climate change

Contribute to the emergence of a low-carbon economy capable of preserving the common good



Health and safety over the whole value chain

Our main responsibility is to ensure the health and safety of our employees and our stakeholders

Inclusion and diversity

Have broadly diverse teams to build an open and engaging corporate culture

Local and inclusive value creation

Be a corporate citizen in every country

Integration of environmental, social and societal issues to contribute to the common good and the general interest.

CLIMATE COMMITMENTS

Environmental targets (2010-2025)

- 50%

of non-recovered waste,
0 long term

- 15%

of energy consumption

- 20%

CO₂ emissions

- 80%

of waste water discharges in liquid
form, 0 long term

Extraction of
9,025,000
tons of virgin materials
avoided in 2018

Internal carbon price

integrated into decision-making procedures on
investments and R&D projects

Saint-Gobain appears for the first time on
**CDP's Climate Change
A List**





SOcial & Societal Commitments



Around
720,000
direct and indirect jobs generated by
Saint-Gobain worldwide

Community actions through the
Saint-Gobain Foundation
and local foundations

€6.8m
invested in 2018 in local community projects

47
countries participate in the Group Savings Plan

8%
of the Group's shares are held by the employees

Diversity index
91%

31.7%
of managers hired in 2018
were women, and 27.7% of promotions

23.8%
of female executives in 2018

2.4
TRAR (rate of accidents with and without lost-time),
i.e. a reduction of 8% between 2017 and 2018

Around
95%
of new executives trained on Group ethics
within the first year of being hired

INVENT
YOURSELF.
RESHAPE
THE WORLD.



SAINT-GOBAIN :
GLOBAL TOP EMPLOYER

5 Attitudes

- Cultivate customer intimacy
- Act as an entrepreneur
- Innovate
- Be agile
- Build an open and engaging culture



A warm, indoor scene featuring a woman with dark, curly hair, wearing a white long-sleeved top, sitting on the floor. She is holding a young child with light brown hair, wearing a red and blue plaid shirt and denim overalls. The child is looking down at a ginger cat with blue eyes that the woman is holding. They are in a kitchen with white cabinets and a window in the background. The text "UK & Ireland" is overlaid in white on the right side of the image.

UK & Ireland

UK & IRELAND – OUR BUSINESS STRUCTURE

ARCHITECTURAL AND BUILDING GLASS



2 BRANDS



700 PEOPLE



9 SITES

The manufacture of float glass and the design of glass for buildings.

DISTRIBUTION OF MATERIALS



21 BRANDS



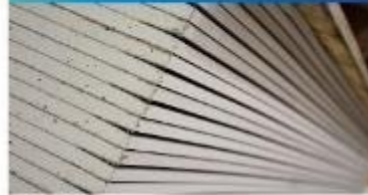
12,000 PEOPLE



1,000 SITES

General merchants, contracts division, plumbing, heating, tiling, timber.

MANUFACTURING FOR CONSTRUCTION



6 BRANDS



2,300 PEOPLE



25 SITES

Plaster, plasterboard, insulation, render, mortars.

INSULATION UK



2 BRANDS



320 PEOPLE



3 SITES

The manufacture of high-performance thermal insulation. Glasswool and PIR.

OFF-SITE SOLUTIONS



4 BRANDS



1,070 PEOPLE



18 SITES

Roof solutions, whole-house timber kits, steel frame buildings, closed and open panel systems.

CONTRACTS



3 BRANDS



489 PEOPLE



30 SITES

The distribution of materials for civils, ground-workers and infrastructure projects.

SAINT-GOBAIN UK & IRELAND – OUR BRANDS

GLASS FOR BUILDINGS AND ARCHITECTURE



MANUFACTURING FOR CONSTRUCTION



INSULATION UK

DISTRIBUTION OF MATERIALS FOR CONSTRUCTION, RENOVATION & INFRASTRUCTURE

GENERAL MATERIALS



PLUMBING / HEATING / BATHROOM



SAINT-GOBAIN CONTRACTS DIVISION



TILING / FLOORING / SURFACES



SERVICES



SPECIALISTS INCLUDING: TIMBER AND IRONMONGERY



SAINT-GOBAIN'S GLOBAL BRANDS – PRESENT IN THE UK & IRELAND

CONSTRUCTION SPECIALITIES



6 brands



600 people



5 sites

Cast Iron pipes, Acoustic Solutions, Specialist Glass, Gypsum, Aggregates.

HIGH PERFORMANCE SOLUTIONS



13 brands



1,150 people



10 sites

Abrasives, Ceramics, Plastics, Bearings, Tubing, Life Sciences.

SAINT-GOBAIN UK & IRELAND – OUR BRANDS

CONSTRUCTION SPECIALITIES



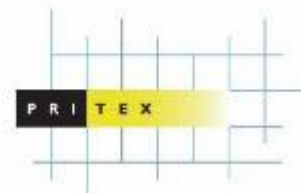
HIGH PERFORMANCE SOLUTIONS



ABRASIVES / CERAMICS / LIFE SCIENCES / PERFORMANCE PLASTICS



WINTER





Commitment to CSR

SAINT-GOBAIN

COMMITTED TO CSR

WE ARE COMMITTED TO BEING A MAJOR AND LONG-TERM CONTRIBUTOR TO SOCIAL AND ECONOMIC DEVELOPMENT, ACTIVELY ENGAGING WITH STAKEHOLDERS ACROSS OUR VALUE CHAIN.



COMMITMENT 1

Changing how we build for the better, for the future



COMMITMENT 2

Caring for the environment we operate in



COMMITMENT 3

Supporting and developing our people



COMMITMENT 4

Connecting with our communities and supporting their economic development



MORE: View our CSR reviews at: www.saint-gobain.co.uk/csr





COMMITMENT 1: CHANGING HOW WE BUILD FOR THE BETTER, FOR THE FUTURE

2016: the UK's first building built to Multi Comfort specification. The Multi Comfort concept redefines the standard for high performing comfortable buildings.



2018: Saint-Gobain launches a new training academy with Barnardo's to upskill young people.



2017: second intake for the Saint-Gobain Entrepreneurship Foundation. The foundation helps small businesses grow through training and mentorship.



COMMITMENT 2: CARING FOR THE ENVIRONMENT WE OPERATE IN



MORE:
www.saint-gobain.co.uk/csr



SUSTAINABLE RESOURCES

Our ambition is to manage resources efficiently and work towards a circular economy.

Our long-term aim is for all industrial waste to be recovered and re-used.

SINCE 2010:

48% LESS WASTE
TO LANDFILL



ENERGY, CARBON AND ATMOSPHERIC EMISSIONS

We promote energy efficiency and are reducing atmospheric emissions across all our activities. Our products and services are key ingredients in reducing the built environment's carbon footprint.

SINCE 2010:

32.16% LESS CO₂
FROM MAJOR SITES



WATER

We aim to reduce the impact of our activities on water resources both in how much we use and how we discharge used water.

The long-term objective being to strive towards zero discharges of industrial water.

SINCE 2010:

38.82% LESS
WATER DISCHARGED



BIODIVERSITY

We are working to reduce our impact, across the whole natural habitat.

This includes the impact of human activities on the planet, such as overexploitation of resources or habitat destruction.

SINCE 2010:

11.77% LESS
NO_x RELEASED





COMMITMENT 2: CARING FOR THE ENVIRONMENT WE OPERATE IN



2017: We began closed-loop pilot schemes for used window glass



2016: We switched our energy sources to renewable-only generated electricity across all 1,100 sites



2017: We introduced a new construction and demolition waste recycling scheme in Luton



COMMITMENT 3: SUPPORTING AND DEVELOPING OUR PEOPLE



WE ARE COMMITTED TO ENCOURAGING THE CONTINUOUS DEVELOPMENT FOR OUR COLLEAGUES

- A **Top Employer in the UK** [7th consecutive year], and **Ireland** [4th consecutive year]
- **Finalist:** Employee Benefits Awards: Large Employer: *Best healthcare and wellbeing benefits category*
- 2017: **Learnfest** launched – week-long learning festival for colleagues
- 2016/17: **Fit 2 Lead Programme** launched – leadership development focussing on being fit, healthy and mentally resilient
- 2017: **Apprenticeship Strategy** launched – to significantly grow our Apprenticeship career path



COMMITMENT 4: CONNECTING WITH OUR COMMUNITIES AND SUPPORTING THEIR ECONOMIC DEVELOPMENT

Supporting our communities



SUPPORTING COMMUNITY GROUPS

Charity partnership with Barnardo's to develop skills academies and homes for care leavers, Building Better Communities Programme donating to 100's of causes

Responsible sourcing & Modern Slavery



RESPONSIBLE SOURCING/LOCAL SUPPLIER DEVELOPMENT AND ELIMINATING MODERN SLAVERY

Tackling higher risk categories first with supplier assessments and audit requirements

Community activity



BEING ACTIVE IN OUR LOCAL COMMUNITIES

Schools, community volunteering, mentoring, employment advice and skills

TRAINING & SKILLS DEVELOPMENT



We have provided over 700,000 Hours training since 2011



A network of eight training academies in the UK & Ireland - providing training on new technologies and systems



Our facilities can train up to 180 delegates a day



MORE:

Visit www.saint-gobain.co.uk to learn about our training offer.





THE SAINT-GOBAIN ENTREPRENEURSHIP FOUNDATION IS AN INITIATIVE BY SAINT-GOBAIN, IN PARTNERSHIP WITH THE CITB, THE IOEE [THE INSTITUTE OF ENTERPRISE AND ENTREPRENEURS] AND THE SUPPLY CHAIN SCHOOL.

It provides those it supports with **FREE** practical, business and mentoring support, and is the start of the unique, life-long relationship with Saint-Gobain. The Foundation is part of Saint-Gobain's **“Support for Industry”** initiative which is laid out in its CSR strategy. This includes a commitment to support small businesses in the construction industry.

A photograph of a family in a modern, bright room. A father with a beard and a topknot hairstyle is crouching on the right, supporting a young child with both hands. The child is smiling and looking towards the father. In the background on the left, a mother is kneeling and smiling. The room has light-colored walls and a wooden floor. The text "Multi Comfort" is overlaid in the center-right in a large, white, sans-serif font.

Multi Comfort

MULTI COMFORT BUILDINGS

FEEL GOOD, LIVE WELL



At Saint-Gobain, our mission is about creating great places to live and improving peoples' daily life. This led us to develop the **MULTI COMFORT** building concept.

FOR HOMEOWNERS:

The Multi Comfort concept allows you to create a home that works for you and the way you live. A healthy Multi Comfort home will improve your family's wellbeing and daily life, need little maintenance and have exceptionally low running costs.

FOR BUSINESSES:

Businesses can use the Multi Comfort concept to gain a competitive advantage. Staff costs typically account for 90% of a business's operating costs so even small improvements in the indoor environment can improve employees' productivity and bring significant benefits to the business. Multi comfort helps you to reduce your environmental footprint and reduce consumption and maintenance bills.



MULTI COMFORT BUILDINGS

FEEL GOOD, LIVE WELL



Feel

THERMAL COMFORT

A **MULTICOMFORT** building has temperatures of relative stability, neither too hot nor too cold, so we can function comfortably, whatever we're doing.

See

VISUAL COMFORT

MULTICOMFORT buildings have the right type and right amount of light, neither too much nor too little, for specific tasks – whether it's bedtime reading, performing surgery or completing work

Hear

ACOUSTIC COMFORT

MULTICOMFORT buildings have well-balanced acoustic environments to block out unwanted, harmful noise and enhance those sounds that we want, and need, to hear.

Breathe

INDOOR AIR COMFORT

In **MULTICOMFORT** buildings, indoor air is kept fresh and clean – while harmful pollutants, whatever the source, are reduced



MORE:

www.saint-gobain.co.uk/multicomfort

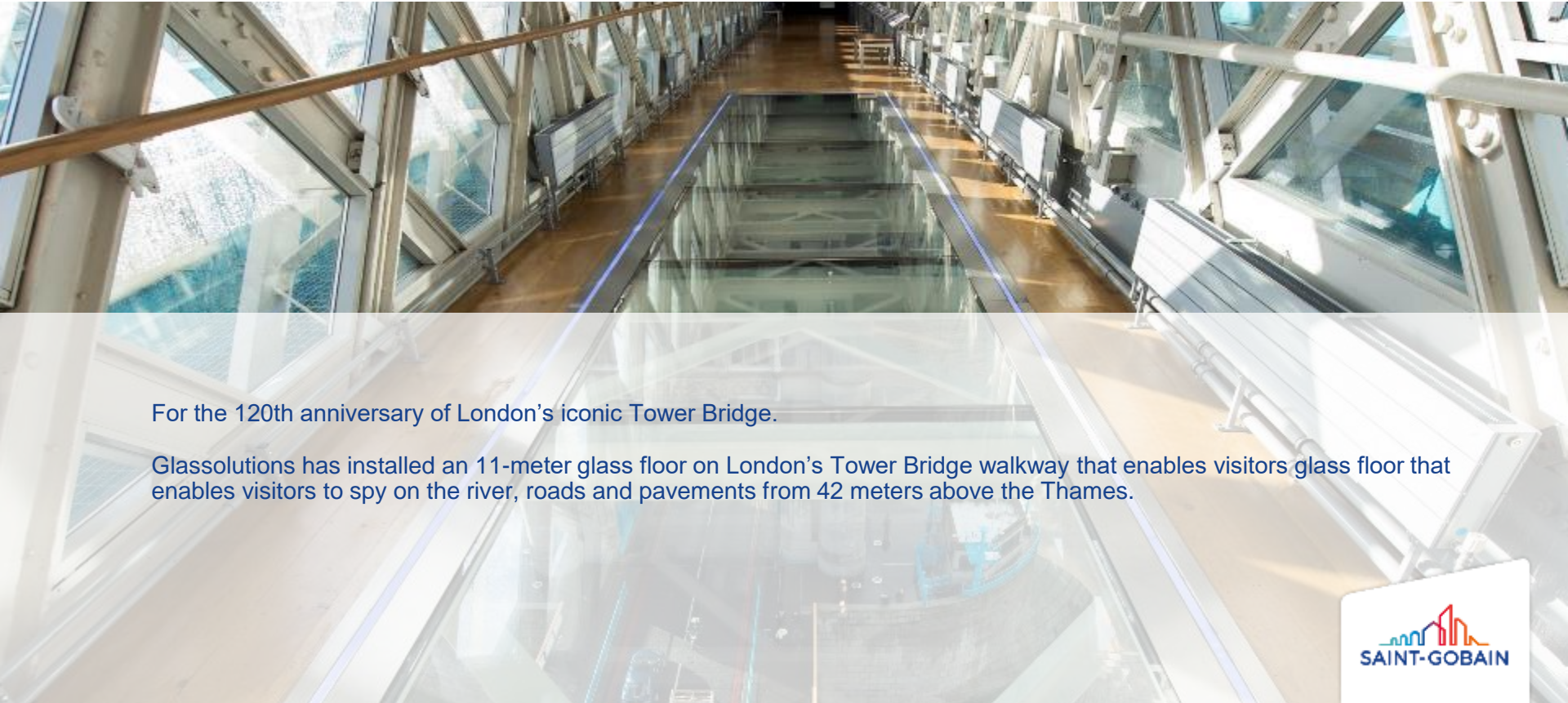




Case Studies

TOWER BRIDGE, LONDON

CONSTRUCTION MATERIALS
PROVIDED BY:



For the 120th anniversary of London's iconic Tower Bridge.

Glassolutions has installed an 11-meter glass floor on London's Tower Bridge walkway that enables visitors glass floor that enables visitors to spy on the river, roads and pavements from 42 meters above the Thames.



MANCHESTER MEDIA CITY

CONSTRUCTION MATERIALS
PROVIDED BY:



Europe's biggest dedicated media centre housing new TV and radio studio, a five story office building, a mix of commercial and residential area

Saint-Gobain provided a range of product solutions to meet the BBC's high acoustic standards. Residential areas specified as a minimum of 3dB above Building Regulations requirements.



SALFORD HOUSE

CONSTRUCTION MATERIALS
PROVIDED BY:



Saint-Gobain first to undertake substantial 'whole-house' renovation – with a Victorian terrace property built in a laboratory.

Outcomes

- Illustrate the comfort and health benefits of different thermal upgrade measures.
 - 63% reduction in heat loss
 - 50% reduction in air leakage

GLASGOW TRANSPORT MUSEUM

CONSTRUCTION MATERIALS
PROVIDED BY:



GLASSOLUTIONS worked closely with the architect at the earliest possible stage to develop the specifications for glazing to most effectively translate the concept into reality.

Amongst the most important factors were natural lighting and the ability to deliver excellent thermal performance which were required to meet the building's overall energy efficiency targets.



PERIVALE PRIMARY SCHOOL, WEST LONDON

CONSTRUCTION MATERIALS
PROVIDED BY:



A new £10m primary school benefitted from a range of Saint-Gobain solutions including acoustic ceiling , external wall insulation, internal partitions and glazing



ST PANCRAS INTERNATIONAL STATION, LONDON

CONSTRUCTION MATERIALS
PROVIDED BY:

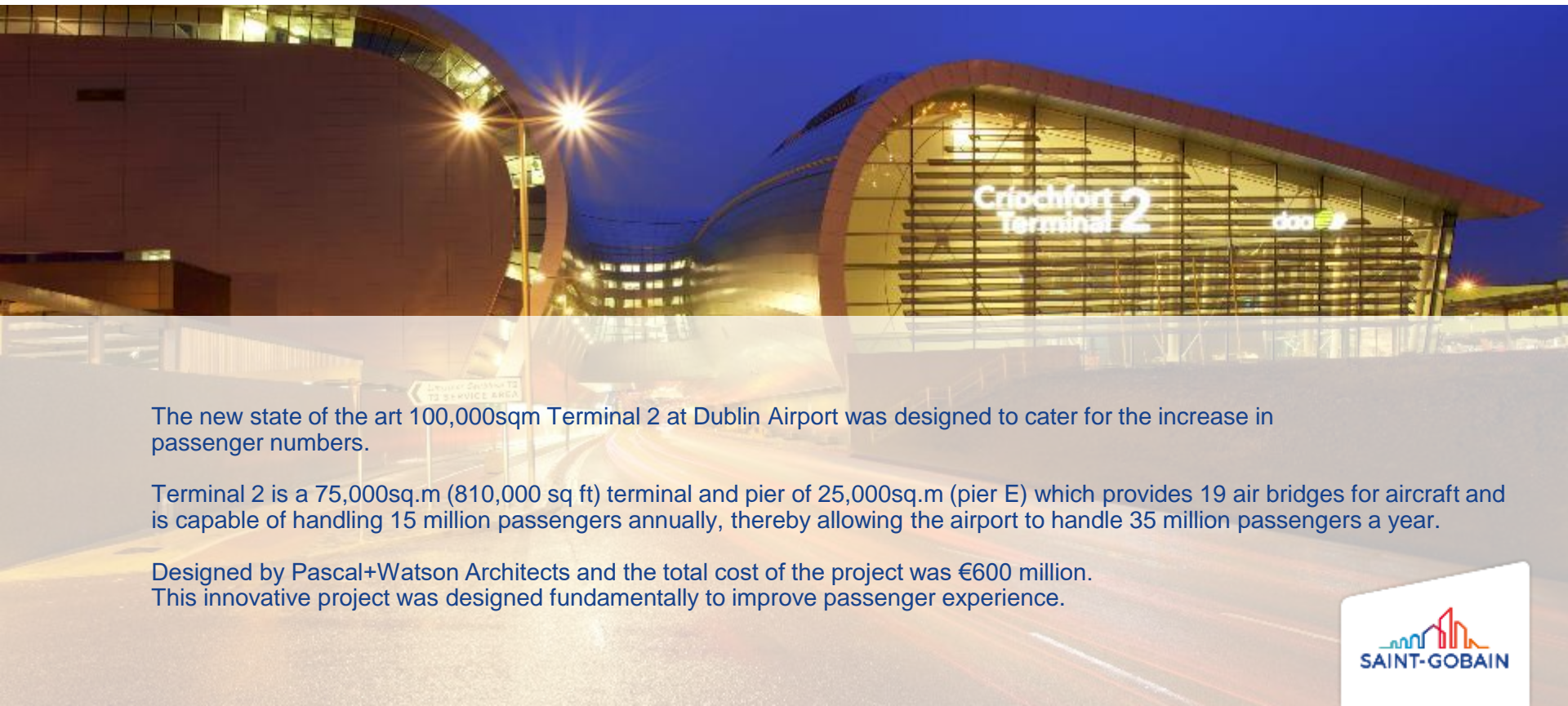


First opened in 1876, St Pancras International is one of London's landmark buildings, a retail and hospitality hotspot. The 200m long fire-rated access tunnel was designed and built, ensuring original features were not lost.



TERMINAL 2, DUBLIN AIRPORT

CONSTRUCTION MATERIALS
PROVIDED BY:



The new state of the art 100,000sqm Terminal 2 at Dublin Airport was designed to cater for the increase in passenger numbers.

Terminal 2 is a 75,000sq.m (810,000 sq ft) terminal and pier of 25,000sq.m (pier E) which provides 19 air bridges for aircraft and is capable of handling 15 million passengers annually, thereby allowing the airport to handle 35 million passengers a year.

Designed by Pascal+Watson Architects and the total cost of the project was €600 million. This innovative project was designed fundamentally to improve passenger experience.



GEORGE BEST CITY AIRPORT, BELFAST

CONSTRUCTION MATERIALS
PROVIDED BY:



Saint-Gobain designed and created an acoustic ceiling that could handle the complexity of a curved plan shape. The efficient installation was economic and allowed access to services above the ceiling.





A SOLID SET OF VALUES

Founded on values, and being a responsible business

WORLDWIDE OR EUROPEAN LEADER

A solid and diverse group and a Worldwide or European leader in its Activities

A CULTURE OF OPERATIONAL EXCELLENCE

And more than 350 years of experience

A DEEP UNDERSTANDING OF THE NEEDS

Of building and construction professionals

A UNIQUE PORTFOLIO OF HIGH VALUE-ADDED SOLUTIONS

Breadth, diversity and a commitment to excellence

A BRAND

with a growing reputation with professional and private individuals.

FOR MORE INFORMATION

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Saint-Gobain UK & Ireland



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Saint-Gobain UK and Ireland