

# NORTH AMERICA **INVESTOR MEETING**

SEPTEMBER 22, 2023



# SAINT-GOBAIN STRATEGY



**Benoit BAZIN**

Chief Executive Officer

# THE WORLDWIDE LEADER IN LIGHT & SUSTAINABLE CONSTRUCTION

OUR  
**GROW &  
IMPACT**  
STRATEGY

*DELIVERING CONSISTENTLY  
STRONG PERFORMANCE*

01

**A successful strategic transformation**

02

**Our growth journey in North America**

# WE HAVE A POWERFUL COUNTRY ORGANIZATION TO DRIVE OUTPERFORMANCE

## A lean organization with local empowerment



**Rapid-decision making**



**Value-creation driven decisions aligned  
with local performance**

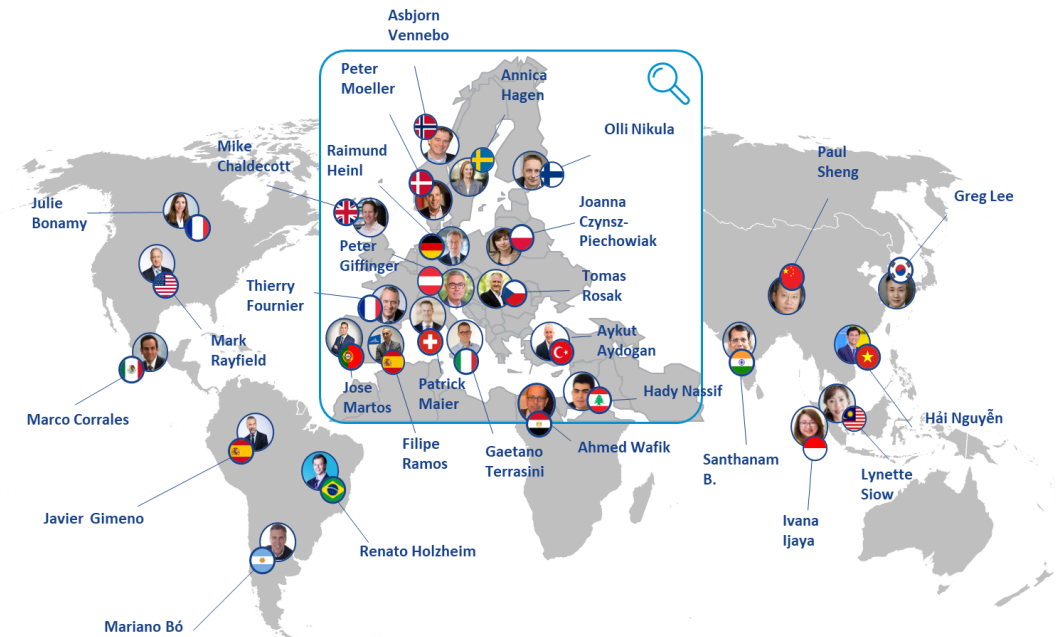


**Solutions-based approach with the  
development of a full range offer in each  
country**

## 90% of CEOs native to their country



**In-depth understanding of local markets**



**Consistent delivery of strong results and outperformance**

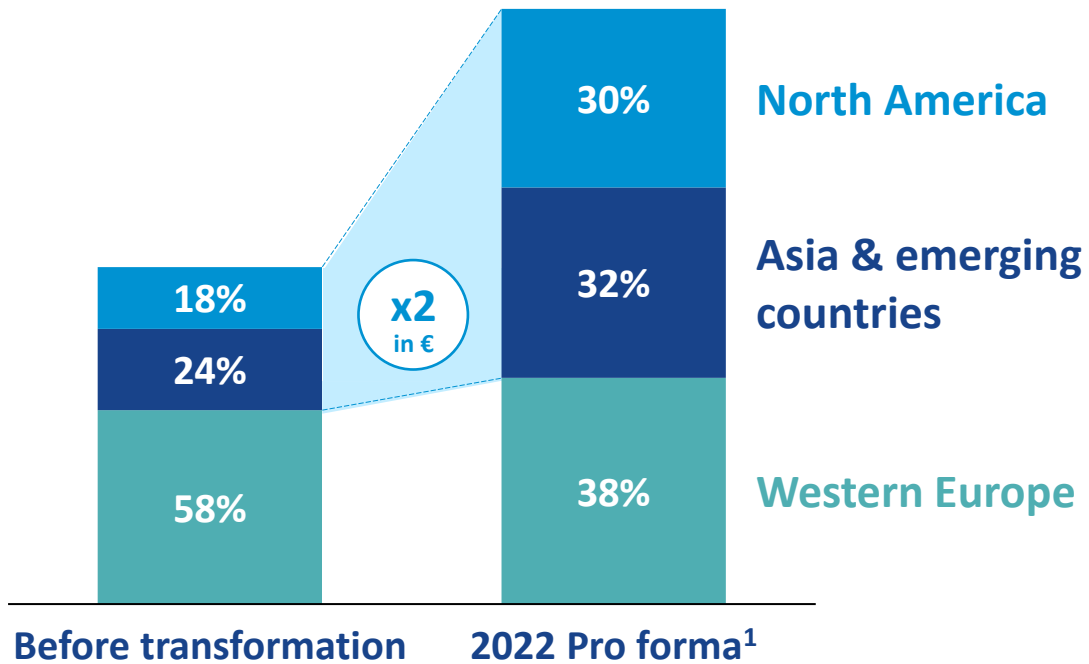


# OUR WELL-BALANCED GEOGRAPHIC MIX SUPPORTS HIGHER PROFITABLE GROWTH AND RESILIENCE

Since transformation

## A balanced geographical exposure

### Share of Group operating income



**>60% of operating income from higher growth markets**

Last 12 months<sup>2</sup>

## Continued dynamic investment

**2/3**

of growth capex allocated in North America, Asia & emerging countries

**+20**

New lines and plants in North America, Asia & emerging countries



1. Pro forma with annualized sales of acquisitions and divestments completed or signed in 2022

2. H2 2022 – H1 2023

# WE ARE CONTINUOUSLY OPTIMIZING OUR PROFILE FOR STRONGER GROWTH AND PROFITABILITY

Since transformation

1/3 of sales rotated<sup>1</sup>

€4.2bn

Sales from value-creative acquisitions

~20%  
EBITDA / Sales

€9.2bn

Sales of underperforming assets divested

<5%  
EBITDA / Sales

Last 12 months<sup>2</sup>

Continued dynamic optimization of Group profile

€2.0bn



KAYCAN



DALSAN  
(JV in Turkey)

MATCHEM  
PAIXÃO PELO SERVIÇO

DRYMiX®

TWIGA  
insulating today for  
a better tomorrow

€3.4bn

JEWSON

DISTRIBUTION IN  
POLAND AND  
DENMARK

CRYSTALS

STEEL  
CERAMICS

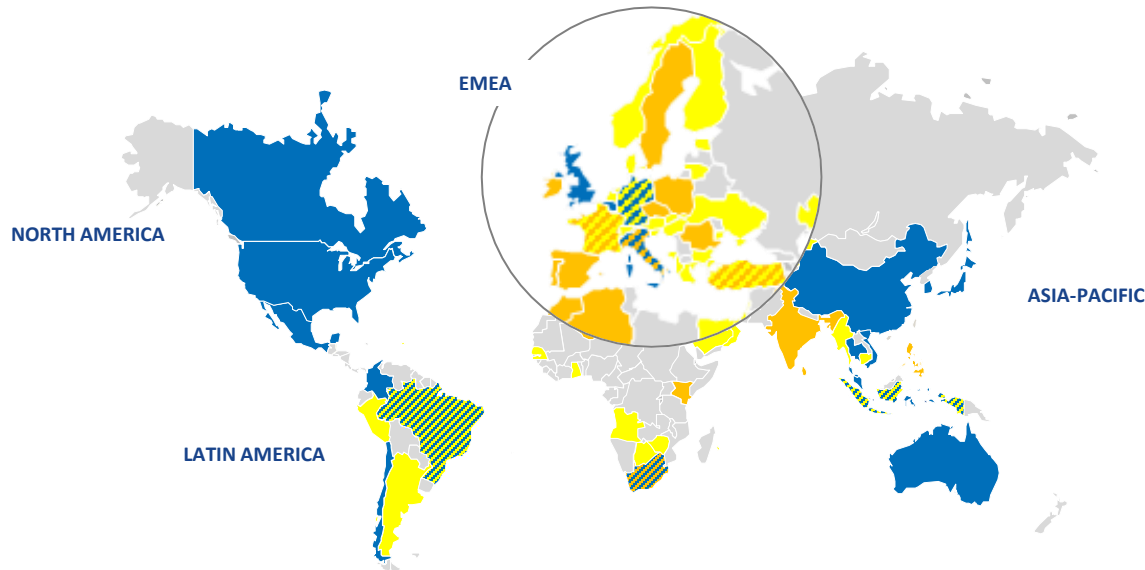
glassolutions  
SAINT-GOBAIN  
(France, Portugal, Switzerland)

1. Transactions completed or signed since the launch of "Transform & Grow" (end of 2018)

2. H2 2022 – H1 2023

# WE ARE STRENGTHENING OUR LEADERSHIP POSITION IN CONSTRUCTION CHEMICALS

A €5.3bn<sup>1</sup> sales platform  
with global coverage



Strong synergies between  **gcp** &  **CHRYSO**  
SAINT-GOBAIN



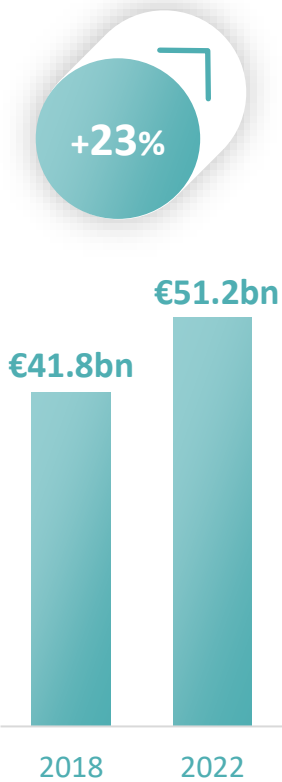
Major commercial wins in North America thanks to  
 **gcp** x  **CHRYSO**  
SAINT-GOBAIN combined teams & capabilities

1. 2022 Pro forma

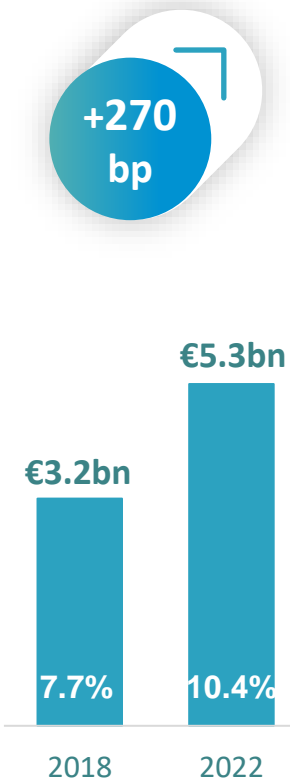


# OUR NEW PROFILE HAS DELIVERED A STRONGLY IMPROVED GROWTH AND PROFITABILITY PERFORMANCE

## DYNAMIC SALES GROWTH



## EXCELLENT MARGIN OPERATING INCOME



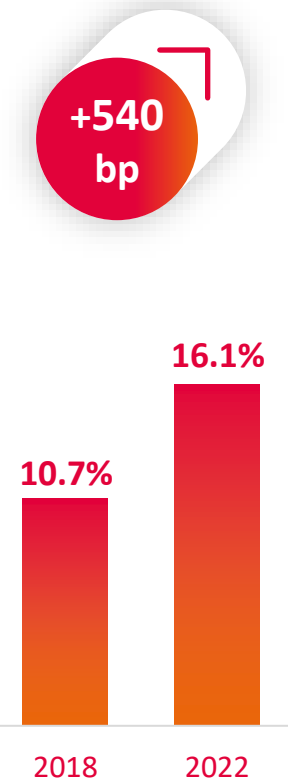
## RECURRING NET INCOME DOUBLED



## FREE CASH FLOW GENERATION TRIPLED



## VALUE CREATION (ROCE) UP 50%



# THE WORLDWIDE LEADER IN LIGHT & SUSTAINABLE CONSTRUCTION

OUR  
**GROW &  
IMPACT**  
STRATEGY

*DELIVERING CONSISTENTLY  
STRONG PERFORMANCE*

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02

Our growth journey in North America

# NORTH AMERICA IS A KEY GROWTH REGION FOR SAINT-GOBAIN



## Structural housing needs

~20m

Housing **units needed** in North America by 2030 to meet demand

*Of which ~14m in the US<sup>1</sup> and ~6m in Canada<sup>2</sup>*

Led by demography and new building usage

## Light construction for new builds

~90%

Share of **light construction** in North America

Supported by need to save time, money and labor

**Growing need for light and sustainable construction solutions**  
**~\$6bn invested in North America in acquisitions and growth capex since 2018**

1. Eye on Housing, from U.S. Department of Housing and Urban Development and U.S. Census Bureau
2. Canada Mortgage and Housing Corporation



# WE ARE STRENGTHENING OUR LEADERSHIP IN NORTH AMERICA WITH VALUE-CREATIVE ACQUISITIONS



Building a leading position in  
gypsum in the United-States



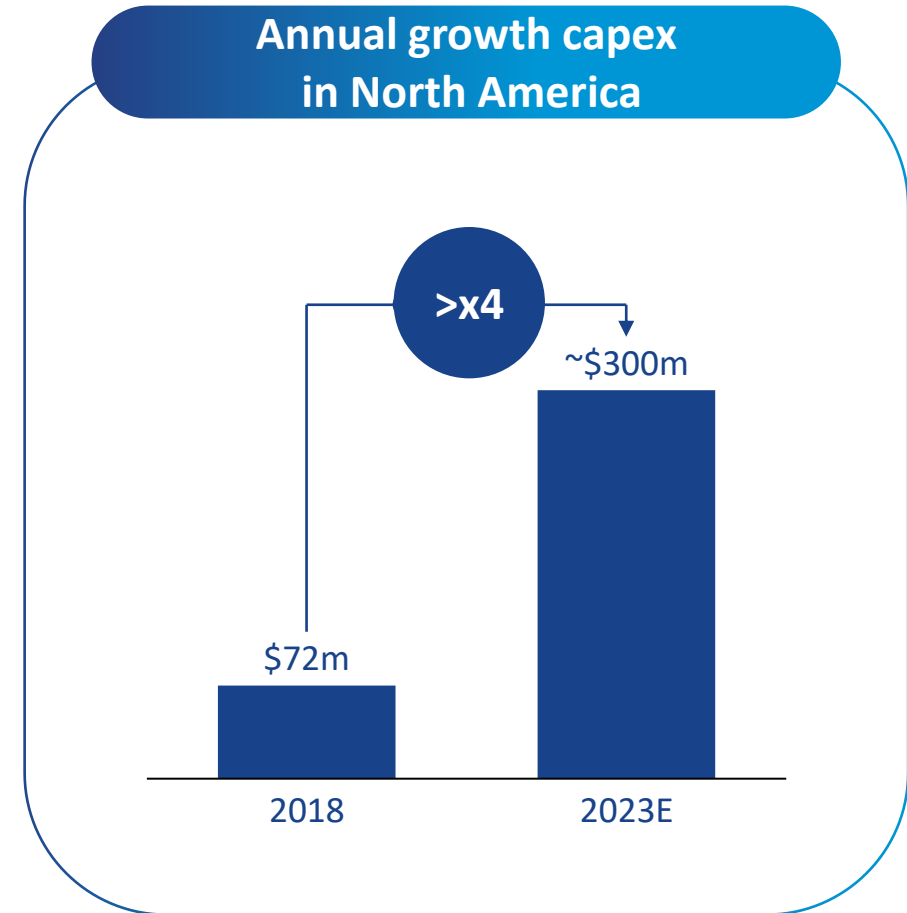
Completing our Canadian offer with  
exterior solutions



Becoming a worldwide leader in  
construction chemicals

**We are delivering on synergies and value-creation**

# WE ARE SIGNIFICANTLY INVESTING IN NORTH AMERICA TO ACCELERATE OUR GROWTH



1. Scope 1 & 2



# WE CONTINUE ON OUR FANTASTIC GROWTH JOURNEY IN NORTH AMERICA



- Now **>\$10bn** in sales
- **Doubled** our size in Canada
- US: **#1** Operating Income contributor for Group
- Invested **\$6bn** in growth



# OUR GROW & IMPACT STRATEGY IN NORTH AMERICA



**Mark RAYFIELD**  
CEO North America





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# A STRONG AND DIVERSE MANAGEMENT TEAM



**NORTH AMERICA REGION**  
Mark Rayfield



**ROOFING\***  
Carmen Bodden



**SIDING\***  
Joe Bondi



**STRAT. BUSINESS  
DEVELOPMENT**  
Kendall Combs



**LEGAL**  
LaToya Hackney



**FINANCE**  
Eric Placidet



**HR & COMMS**  
Magda Dexter



**INTERIOR  
SOLUTIONS**  
Jay Bachmann



**CANADA**  
Julie Bonamy



**COMMERCIAL BUILDING  
ENVELOPE**  
DJ Damberger



**SHARED  
SERVICES**  
Bob Panaro



**PURCHASING**  
Richard Brunel



**RESEARCH &  
DEVELOPMENT**  
Todd DiNoia

\* Common exterior solutions sales team



# SAINT GOBAIN NORTH AMERICA AT A GLANCE

North America  
**Malvern, PA**  
Headquarters

More than  
**9,500**  
Employees

**80**  
Manufacturing  
Facilities

Over  
**118** Years  
With businesses  
In operations

2022 sales\*  
**\$7.3**  
Billion

\* In North America Region, pro forma with annualized sales of acquisitions (Kaycan and GCP)



# CERTAINTEED IS AT THE FOREFRONT OF CONSTRUCTION SOLUTIONS



Only North American manufacturer offering a full breadth of building materials for light construction

Preferred brand for contractors and homeowners, partnered with leading distribution channels

Powerful organization driving market outperformance

**US\$7.3bn**  
*Sales<sup>1</sup>*

**+16%**  
*Sales CAGR 18-22<sup>1</sup>*

**18%**  
*Operating margin<sup>1</sup>*



PLASTERBOARD



INSULATION



ACOUSTIC CEILINGS



ROOFING



SIDING



WATERPROOFING MEMBRANES



ROOFING MEMBRANES

**#1 building materials manufacturer in North America**

1. 2022 pro forma with annualized sales of acquisitions (Kaycan and GCP)

# SUCCESSFUL PORTFOLIO MANAGEMENT

## GYPSUM

Continental



Value creation in year 2 – one year ahead of target

Product line extension in LOWES

## SIDING

Kaycan



Synergies ahead of target in year 1

Completes siding offering with engineered wood and metal

## BUILDING ENVELOPE

GCP



Synergies ahead of target in year 1

Completes building envelope offering

Expanded retail presence

## ROOFING

BP of Canada



BUILDING PRODUCTS OF CANADA CORP.

Closed Sept 1

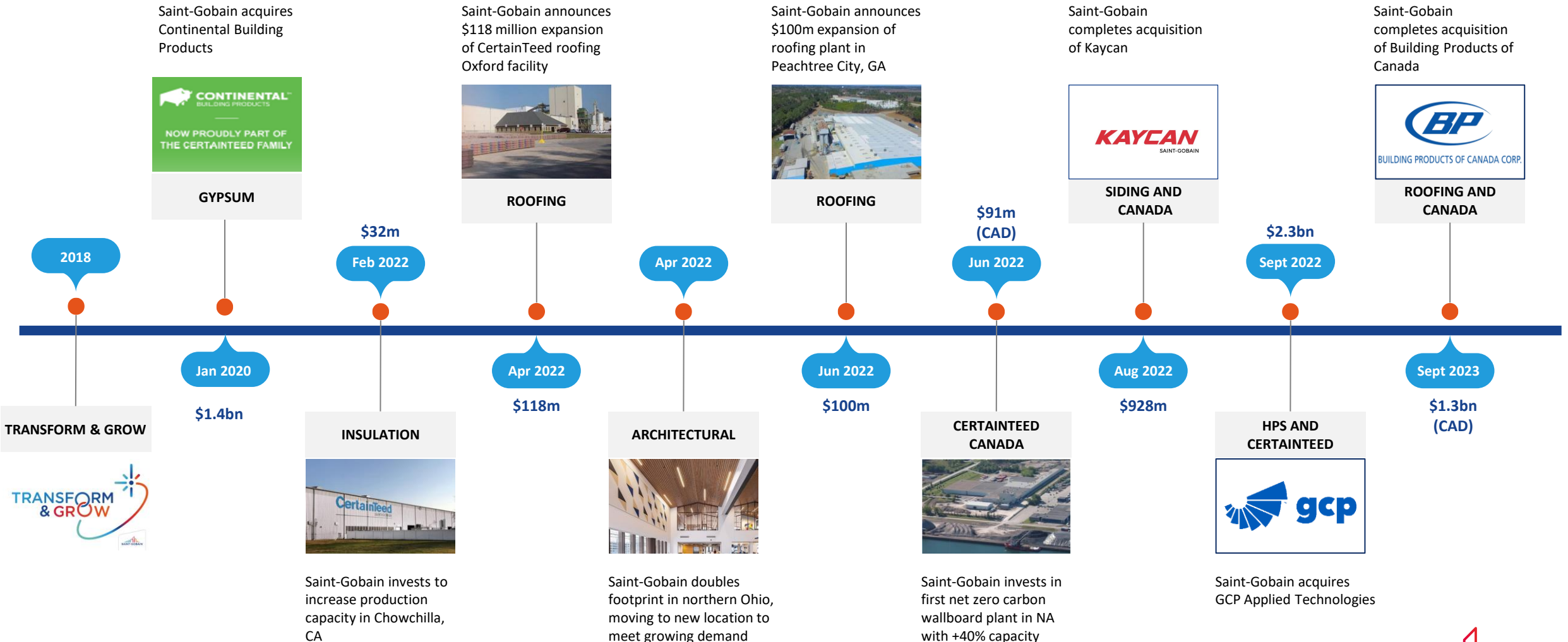
Completes exterior offering in Canada

Expands capacity +3 plants



# NORTH AMERICA GROWTH INITIATIVES

## \$6 billion invested in North America region since 2018



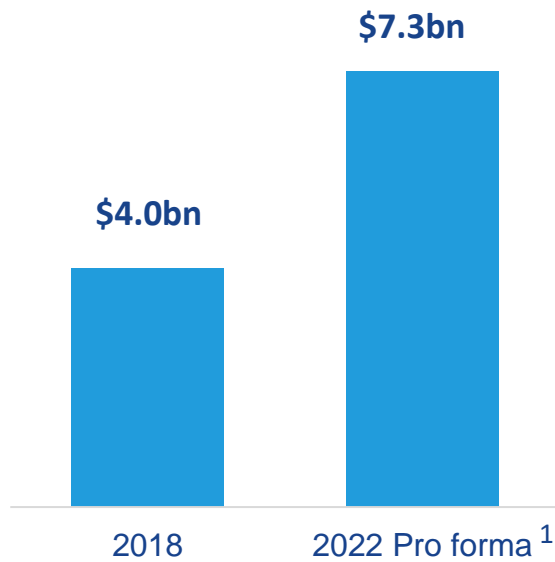


# OUTSTANDING PERFORMANCE



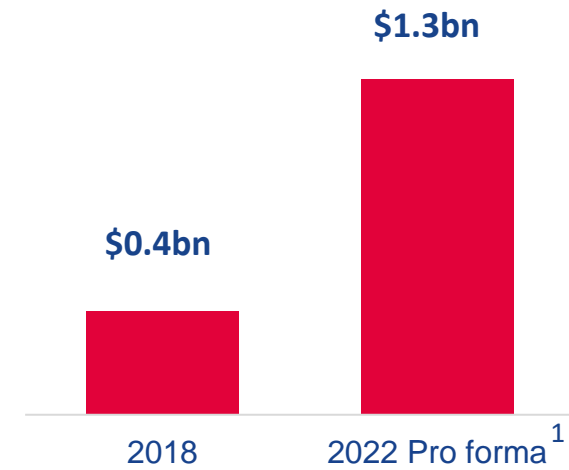
## Nearly doubled sales

Dynamic  
Sales growth



## Tripled Operating Income

Excellent  
Operating margin



1. 2022 pro forma with annualized sales of acquisitions (Kaycan and GCP)



# THE WORLDWIDE LEADER IN LIGHT & SUSTAINABLE CONSTRUCTION

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A bright future in North America



# THE NORTH AMERICA HOUSING MARKET IS SUPPORTED BY STRONG STRUCTURAL DRIVERS



20m housing units needed to meet 2030 North American demand



~14m

Housing units needed



~6m

Housing units needed



Adoption of light construction



~90%

of all construction products spend in North America is on light construction

**Demand for light construction supported by need to save time, money and labor**



Construction Megatrends



Population Growth



New ways of working



Severe weather

Management Estimates/Dodge Data & Analytics 2021 Mid Year Outlook/Freddie Mac/Statista/AIA, FMI, Dodge, Census most recent years (2022)



# PREFERRED BRAND OF CONTRACTOR, PARTNERED WITH LEADING CHANNELS



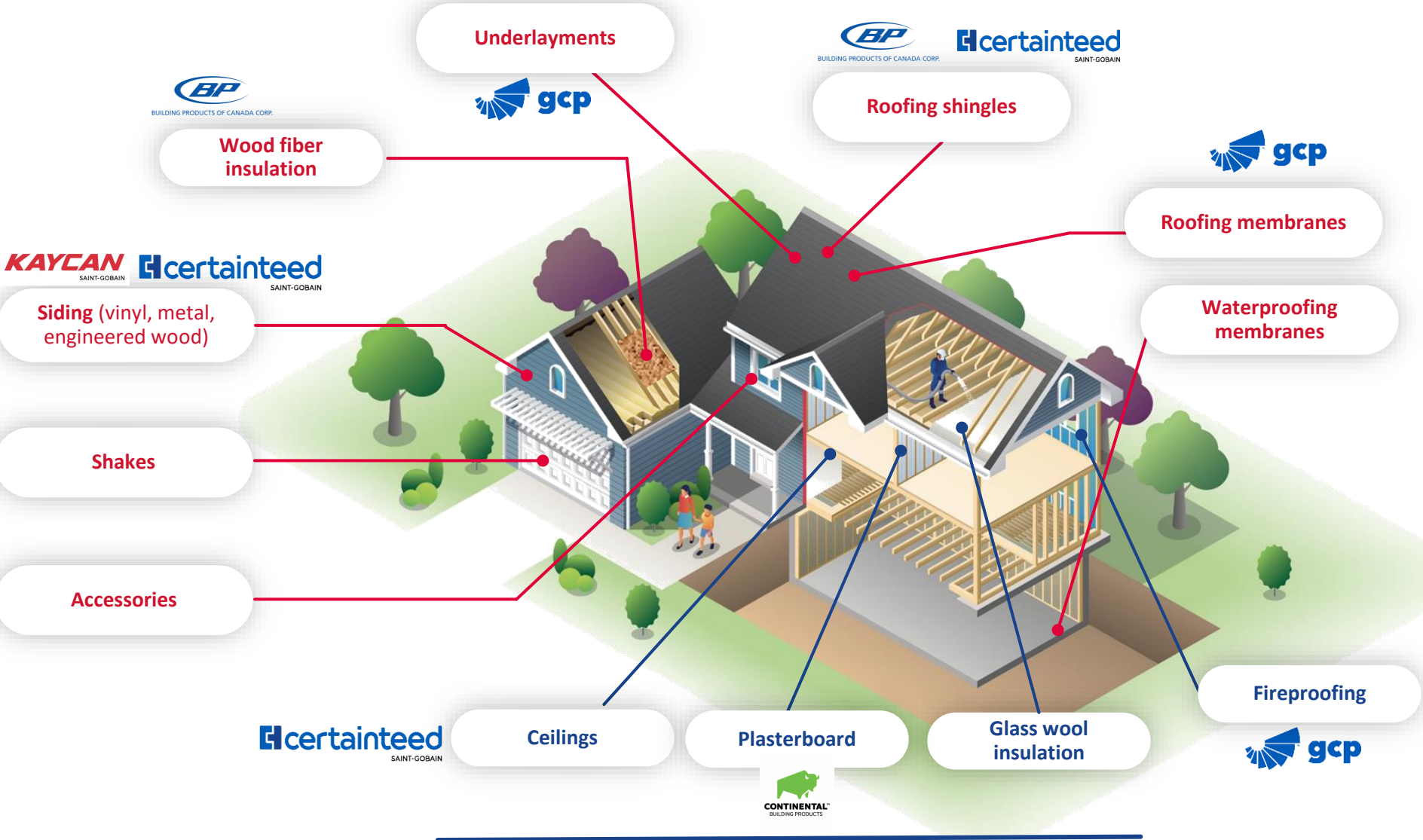
"CertainTeed is  
an important **STRATEGIC PARTNER**"  
Bill Boltz -- Executive Vice President, Lowe's





# SAINT-GOBAIN NORTH AMERICA DIFFERENTIATES WITH A UNIQUE COMPLETE SOLUTION OFFERING

EXTERIOR SOLUTIONS



# WE PROVIDE HIGH VALUE-ADDED SYSTEMS TO OUR CUSTOMERS

## RESIDENTIAL SOLUTIONS (ROOFING & SIDING)



**certainteed**  
SAINT-GOBAIN

**GRACE ICE & WATER SHIELD®**



**VYCOR®**

A complete roofing system to simplify installation and maximize performance  
Siding and other exterior solutions work together to simplify the process

## COMMERCIAL SOLUTIONS



**Preprufe®**



**GlasRoc®**  
PERM-A-BARRIER®

Combine products to create building envelopes that facilitate optimal performance and long-term occupant comfort

# LEVERAGING A SUCCESSFUL EXTERIOR PRODUCT SALES ORGANIZATION TO OUTPERFORM IN CANADA

Since 2018, CertainTeed USA has leveraged one sales team for residential exterior solutions in US



Achieving **Customer Centricity** through improved sales coverage, customer territory management and **cross-selling opportunities**

Strong organization driving **growth** and **market outperformance** in the United States



**+11%**

**Roofing and Siding growth**  
(sales CAGR 2018 - 2022)

**+2 pts**

**Gain in share in roofing**  
(2022 vs. 2018)

**+4 pts**

**Gain in share in siding**  
(2022 vs. 2018)

GCP, Kaycan, and BP of Canada will combine to create one sales team for residential exterior solutions in Canada



## EXTERIOR SOLUTIONS



**ROOFING**



BUILDING PRODUCTS OF CANADA CORP.



**SIDING**



SAINT-GOBAIN



**BUILDING ENVELOPE**



applied technologies

**We increase our share of wallet with active cross-selling of our full-range offering**



# SUSTAINABILITY AT THE CORE



## Reducing CO<sub>2</sub> Emissions Through PPA

**2019** Blooming Grove Wind 250MW

**2022** Cottonwood Bayou Solar 200MW

**2023** Danish Fields Solar 100MW

**>70% reduction of North American scope 2 vs. 2017**



## Site Decarbonization

### Montreal Electrification



First North American zero-carbon scope 1 & 2 gypsum plant



## Product Sustainability



Extending the life of shingles to pave our roads



27 tons of Vinyl Siding scrap collected in 2022 to be repurposed into accessories



# 2023-2025: AIMING HIGHER IN NORTH AMERICA

## AIMING HIGHER

### A COMPLETE PORTFOLIO AND OFFERING



BUILDING PRODUCTS OF CANADA CORP.



### CUSTOMER-CENTRIC INNOVATION

Solstice® Shingle

GRACE ICE & WATER SHIELD®

GlasRoc®  
PERM-A-BARRIER®

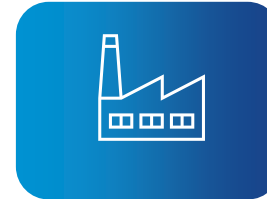
VYCOR®

ASPHALTICA  
ASPHALT INNOVATIONS

## STRATEGIC PRIORITIES



Continue to deliver on recent acquisitions and value-creation



Execute strategic growth capex



Increase sustainability of our solutions and reach our net zero carbon target



Trust, Empowerment, and Collaboration

# INTERIOR SOLUTIONS



**Jay BACHMANN**

VP AND GM, INTERIOR SOLUTIONS

# INVESTMENTS THAT DELIVER VALUE & GROWTH

## Value Creation



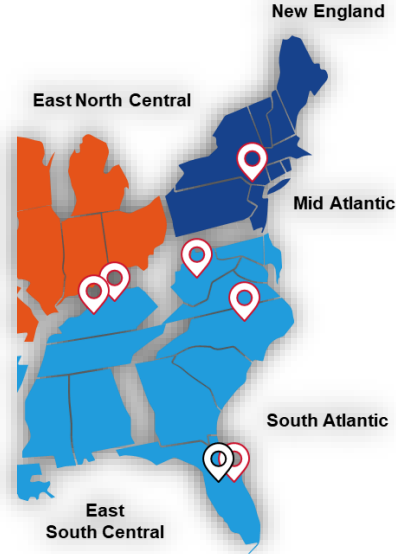
**\$50 million** in cost synergies and performance improvements delivered ahead of schedule



## Enhanced Footprint



Increased Saint-Gobain's **presence in growth regions** in the United States, particularly in the East and Southeast



## New Product Development



Enhanced Saint-Gobain's ability to harness its global **R&D and product development** capabilities to a larger customer base



Integration of Continental Building Products into Saint-Gobain North America achieved targets ahead of schedule



# GROWING MARKETS FOR INTERIOR SOLUTION

## >\$8bn Gypsum Market

Need for new housing and demographic shifts to the United States sunbelt



## >\$3bn Ceilings Market

Commercial growth with specialty ceilings playing a larger role



## >\$11bn Insulation Market

Stricter building codes increasing insulation demand



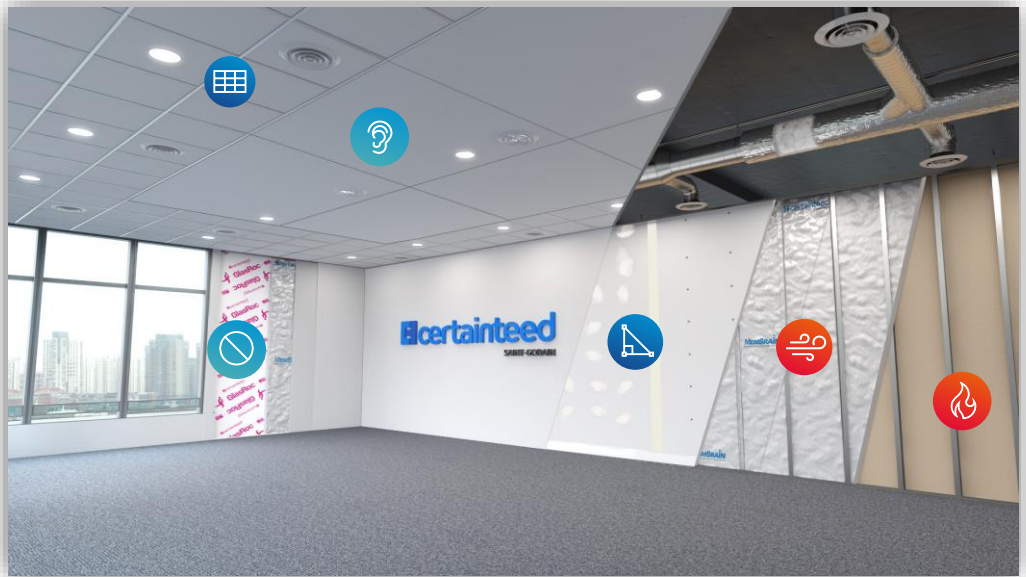
# OUR COMPREHENSIVE PORTFOLIO OF INTERIOR SOLUTIONS IS UNMATCHED







## SOLUTIONS FOR EVERY PART OF THE HOME



- |   |  |
|---|--|
|  Easi-Lite®  |  GlasRoc®     |
|  SilentFX® |  AquaBead®  |
|  Optima®   |  InsulPure® |

## SOLUTIONS FOR EVERY COMMERCIAL BUILDING



- |  |  |
|--|--|
|  Type X     |  MemBrain™    |
|  GlasRoc® |  Symphony M |
|  EZStab   |  No-Coat®   |

# OUTPERFORMANCE THROUGH ONE VOICE TO THE CUSTOMER



**Architects**



**Offsite Construction**



**Distribution**



**Commercial  
Contractors**



**Retail**

**Our product portfolio crosses the same channels and gives  
Saint-Gobain an advantage in service and solutions**



# OUR FOCUS TO INNOVATE AROUND THE CUSTOMER



No-Coat Pro Machine = Faster drywall finishing



GlasRoc Sheathing is a lightweight, paperless gypsum board with a water-resistant core and fully embedded glass mat for exterior applications



MaxPro fiberglass system combines fiberglass technology with a powerful blowing machine and patented hose that increases speed of installation and reduces fuel usage

Innovate on ease and speed of installation for the contractor

# OUR FOCUS TO PROVIDE CUSTOMER SOLUTIONS



## Acoustic comfort

**System performance**  
Partition Sound Transmission  
(STC)



## Fire performance

**System performance**  
Mechanical strength time for  
system failure



## Water resistance

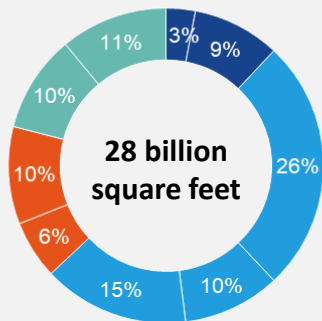
**System performance**  
Mechanical strength water  
absorption & weather  
durability



**We help architects and contractors address their issues**

# INVESTING IN GROWTH AREAS

Market size (2022)



- New England
- Mid Atlantic
- South Atlantic
- East South Central
- West South Central
- West North Central
- East North Central
- Mountain
- Pacific



Gypsum Pilots Circular Economy Program in Buchanan, New York



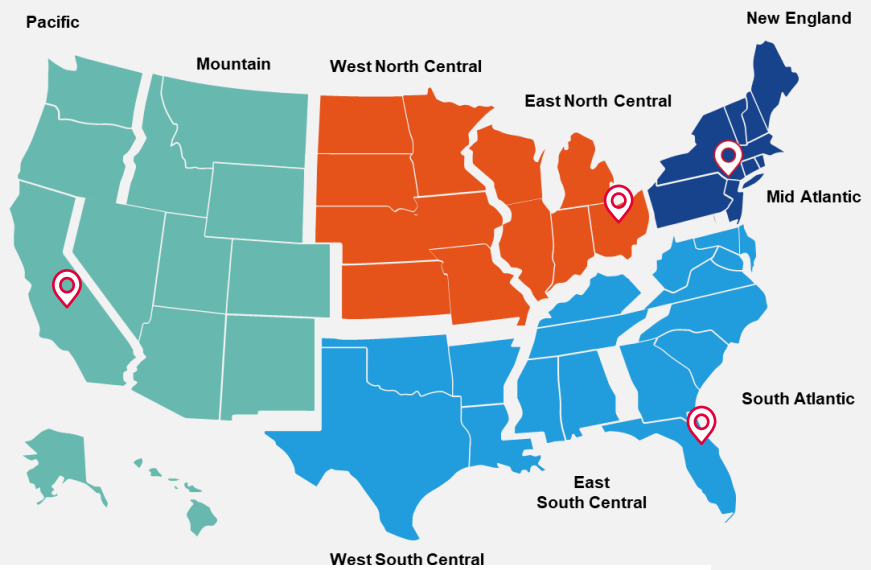
Palatka, Florida expansion of 1bn square feet



Capacity expansion in Strongsville, Ohio for wood ceilings

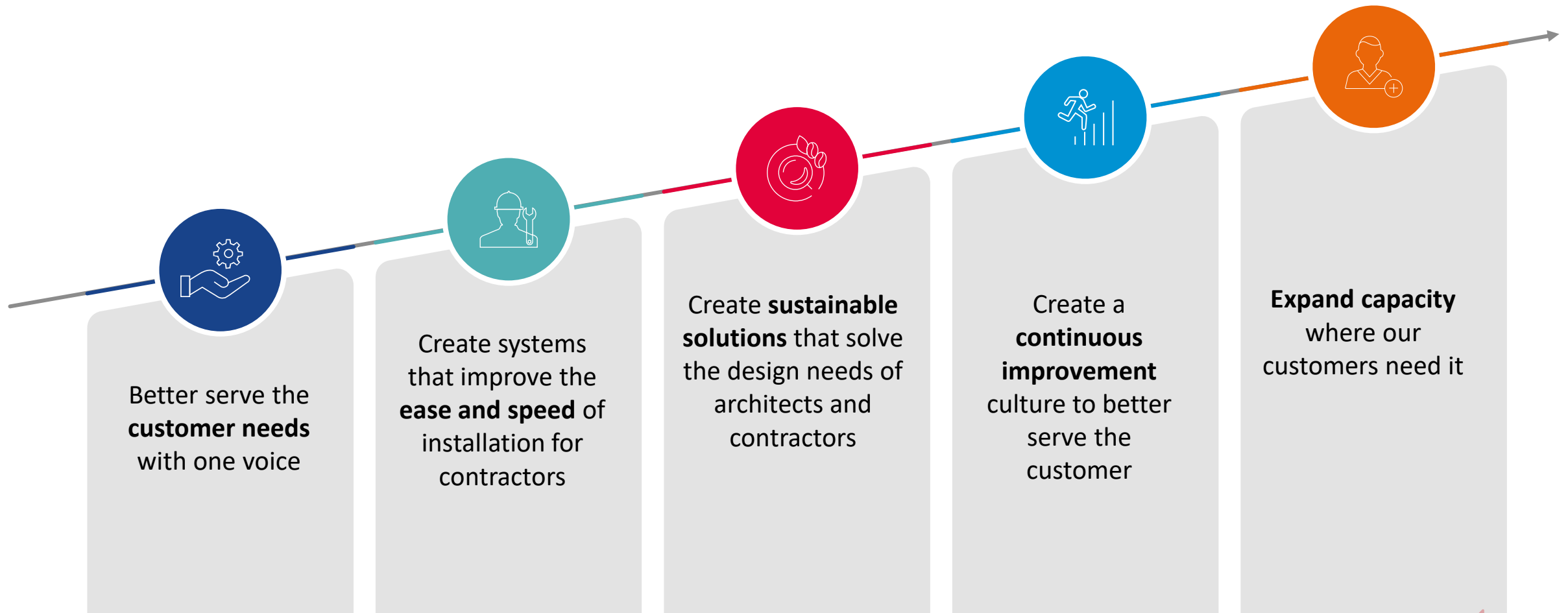


Increase production capacity in Chowchilla, California





# THE PATH FOR INTERIOR SOLUTIONS SUCCESS



# EXTERIOR SOLUTIONS



**Carmen BODDEN**

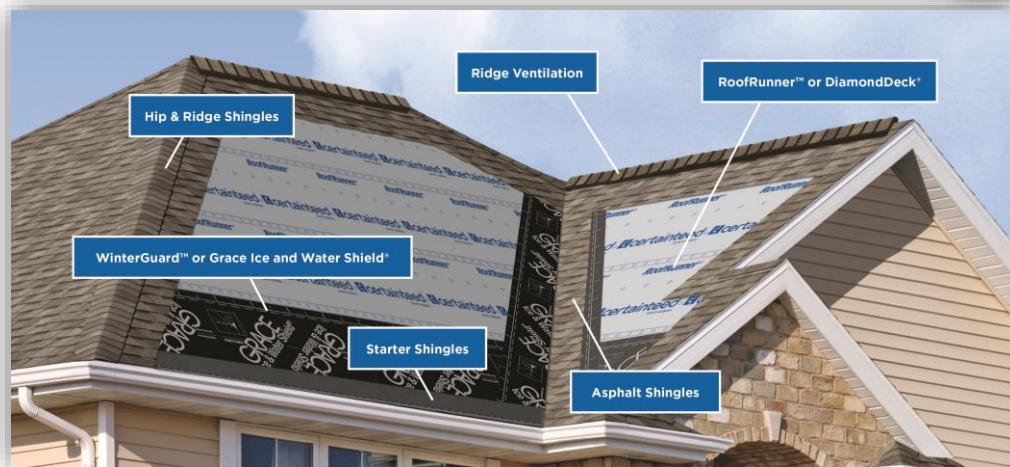
VP AND GM, CertainTeed Roofing



# SHINGLES ARE THE PRIMARY ROOFING MATERIAL IN NORTH AMERICA AND A KEY COMPONENT OF LIGHT CONSTRUCTION



- The housing in the United States is primarily detached and for single family
- Most roofs have a 'steep slope' or pitch
- Weatherproofing layers and shingles are attached to timber framing, creating a lightweight, durable roofing system
- System solutions comprise more than 80% of sales





# A COMPREHENSIVE OFFER OF SIDING SOLUTIONS

**Aluminum**



**PVC**



**Wood**



**Stone**



**CertainTeed leads the vinyl and polymer siding industry in innovation, quality, performance, design, and service**

# SAINT-GOBAIN EXTERIOR SOLUTIONS ARE DESIGNED TO WORK TOGETHER

## Homeowner Reasons for Choosing Exterior Solutions



### Aesthetics and Value

- Color & Design
- Cost



### Performance

- Quality & Warranty
- Water and Wind resistance
- Fire, algae or impact resistance

## Installer Preference



1. Quality & Warranty
2. Service
3. Product Selection & Features



CertainTeed manufactures both roofing and cladding materials



Easy, coordinated design and color decisions for homeowners



Utilize GCP underlayment & air vapor barrier to drive performance

# ANATOMY OF A ROOFING SHINGLE

## Purpose of Raw Material

### Granules

- Protection from ultraviolet rays
- Adds color for aesthetics
- Can reflect sun to reduce energy costs

**Asphalt:** long-lasting waterproofing

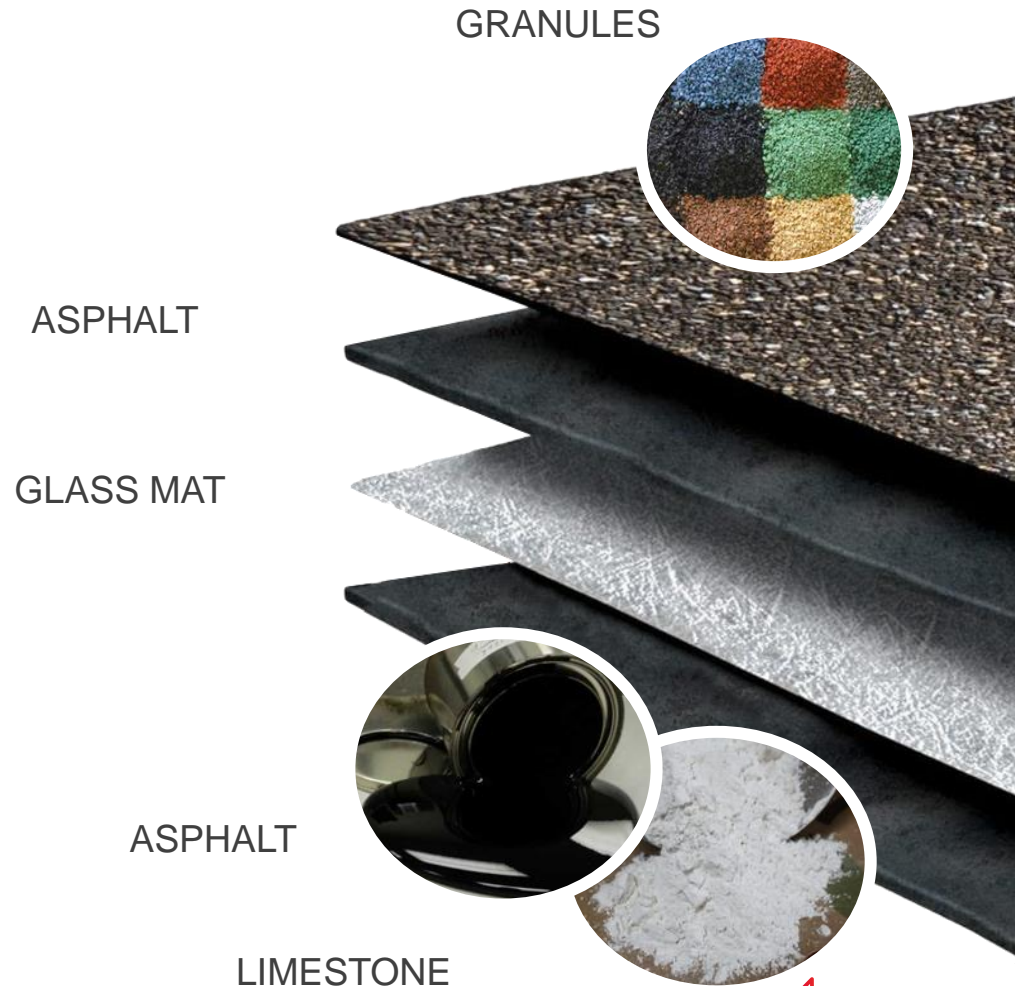
### Limestone

- Mechanical stabilizer
- Fire resistant

### Glass mat

- Mechanical strength
- Water resistant

**Sand:** separator between shingles



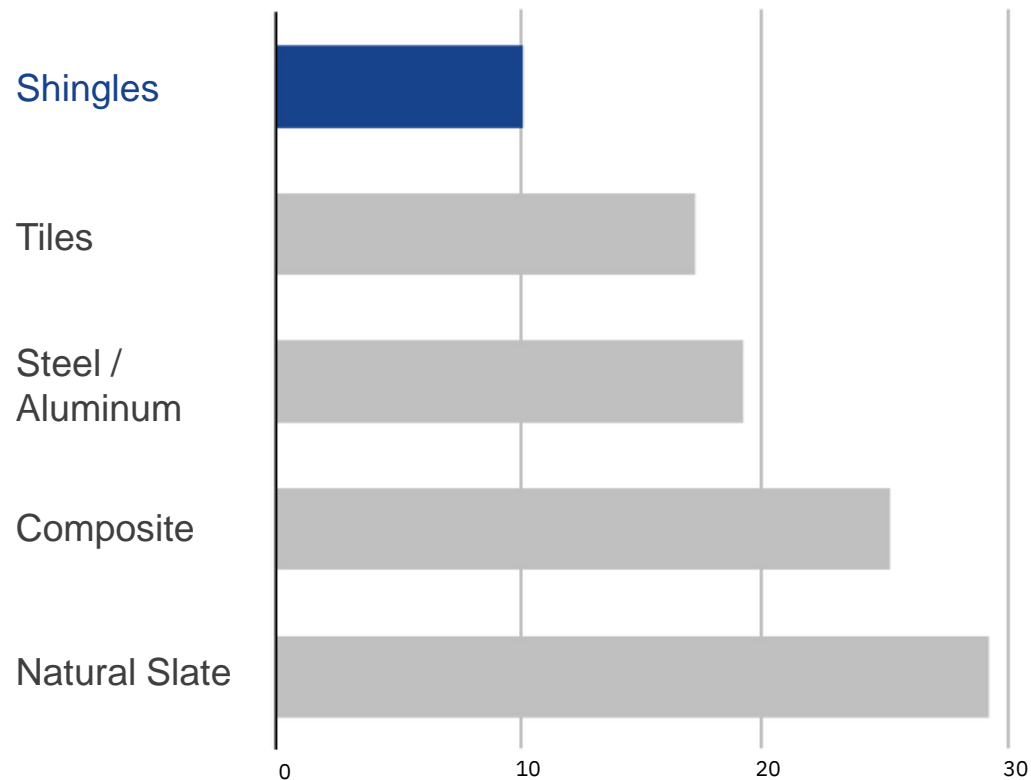




# VALUE AND PERFORMANCE MAKE SHINGLES THE PREFERRED SOLUTION IN NORTH AMERICA

**Shingles have the lowest installed cost of all roofing products**

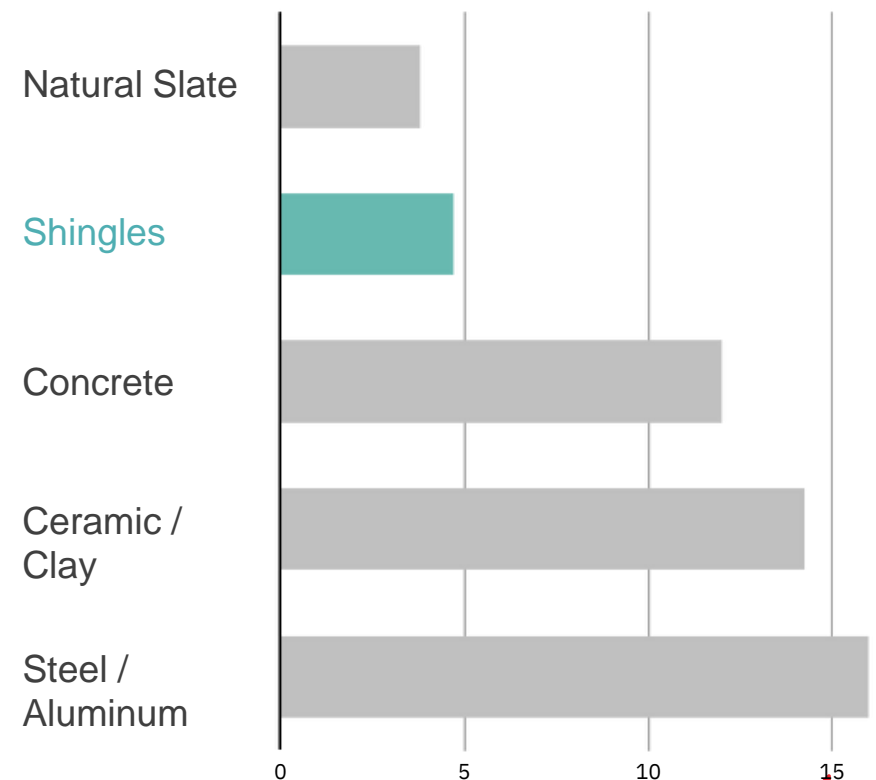
**Installed cost of a typical roof\*** (US\$ in thousands)



Source: Management estimates

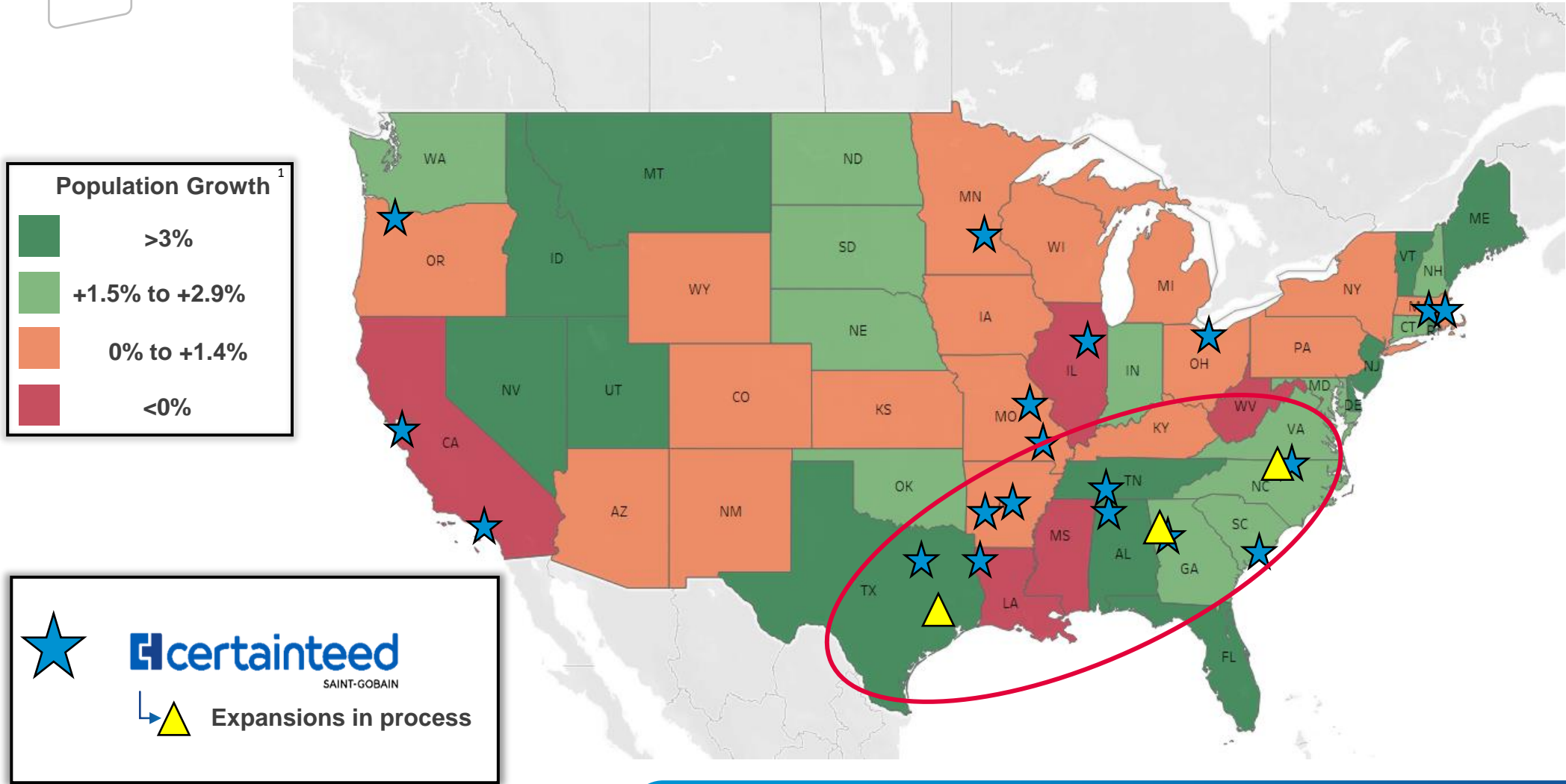
**Shingles offer one of the lowest carbon footprints among common roofing products**

**Carbon emission factor of roofing products from extraction to manufacturing** (in kg CO<sub>2</sub>e per m<sup>2</sup> product)



Source: Industry-wide Environmental Product Declarations (EPDs)

THERE ARE 19 ROOFING SITES IN THE UNITED STATES WITH 3 EXPANSIONS UNDERWAY

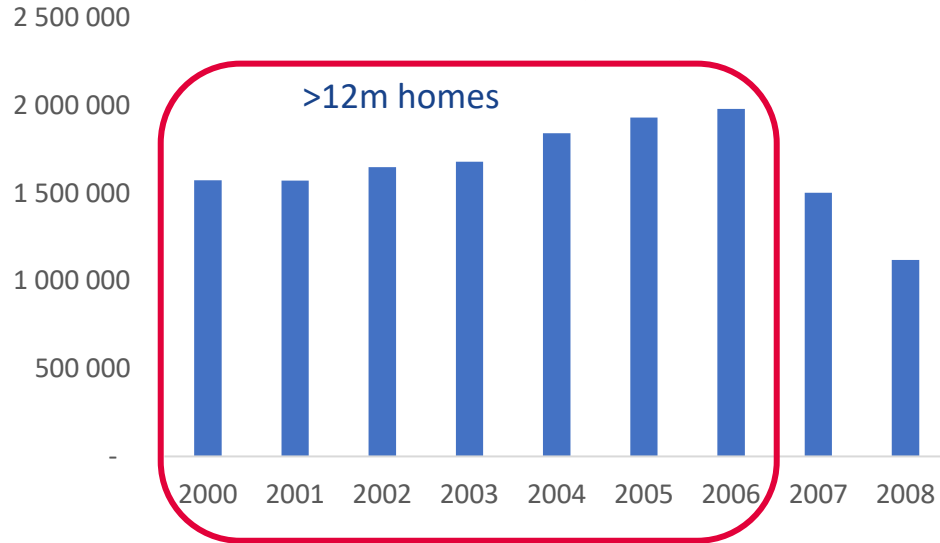


Delivery of new plants in fast growing Southern US

# MOST ROOFING DEMAND IS NON-DISCRETIONARY

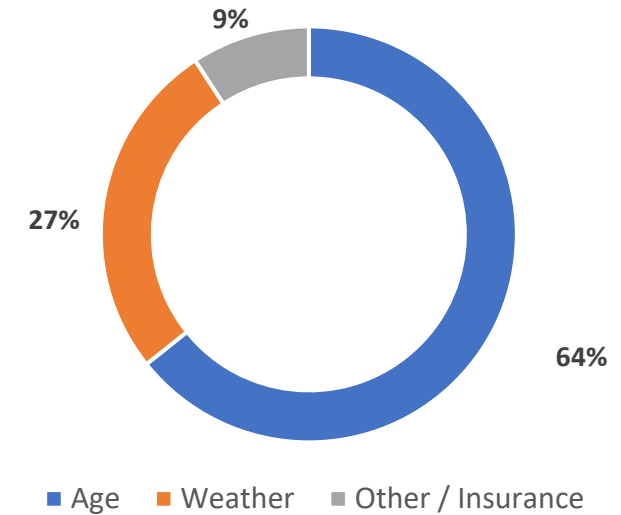
Roof Age and Weather are >80% of roofing demand

US Residential Single Family Completions



- Average roof lifetime is ~20 years
- 142m Total Residential Housing Units in the US
- >12m homes built in early 2000's are entering roof replacement age

Reason for Roof Replacement (Avg. 2012-2021)



- Most roof replacements are driven by age and weather
- Increasing frequency of severe weather events



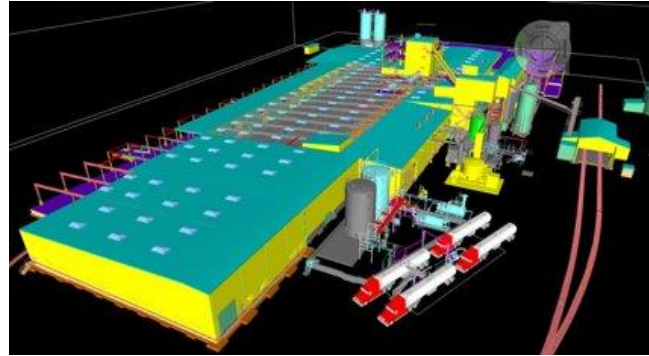
# CONTINUED INVESTMENT IN GROWTH PROJECTS

Delivery of new plants and enhanced service capabilities



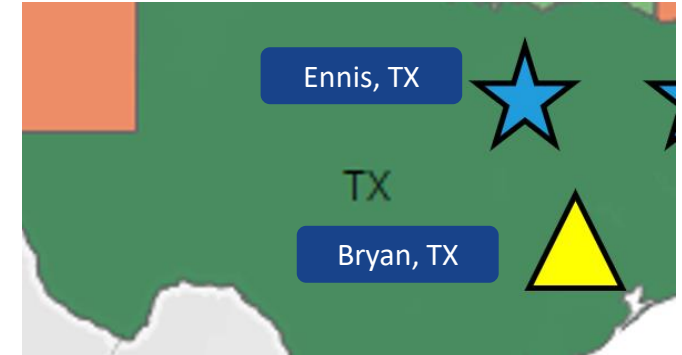
## Glass Mat Plant – Shingle Raw Material

- New industry standard for glass mat plants – focus on lighter and stronger shingles
- Energy and water reduction technology
- Innovative warehouse automation



## Expanding Shingle Plant

- Investment in Peachtree City, Georgia
- Innovative design with decreased energy usage
- Well positioned to service retail customers and weather-related demand



## Serving Growing Markets

- 15% of US shingle demand is in Texas
- Preparing for future capacity
- Maximize sustainable use of rail – minimize carbon from transportation

# INNOVATION PRIORITIES FOCUSED ON SOLUTIONS, SUSTAINABILITY

## Processes and solutions for a zero-carbon transition



### *Solar Roofing and Solar Reflective Shingles*

- Solar reflective shingles reflecting up to 40% of the sun's heat
- Reduce cooling costs for homeowners

## Solutions to minimize the use of natural resources



### *Roofs to Roads Shingle Recycling*

- Extend the life of shingles
- Increase recycled content

## Light construction systems



### *Engineered Performance*

- More shingle pallets on each truck, lower carbon footprint – more sustainable
- Improved contractor experience – easier to install

## Materials and solutions to grow new markets



### *Polymer Modified Asphalt Shingles for Severe Weather*

- Improved hail impact performance
- Can be installed in cold conditions

# DIFFERENTIATED SOLAR SYSTEMS FOR A GROWING MARKET

**The US residential solar market is massive and growing**

14m new install over next 10 years  
33% CAGR over the past 10 years

**The Inflation Reduction Act (IRA) is turbocharging the growth**

30% solar tax credit through 2032

**Convergence of roofing and solar creates immense pull**

Certified contractors  
Key partners investing in growth

**Integrated systems and leading aesthetics designed in close collaboration with installers**

**Solstice® Panel**



**Solstice® Shingle**



Green Builder 2023  
Sustainable Product of  
the Year

**Solstice® One**





# ROBUST INNOVATION IN CIRCULAR ECONOMY TO EXTEND THE USEFUL LIFE OF SHINGLES

## Shingle remanufacture and reuse into roads

- Asphaltica technology is a novel way to recycle asphalt shingles into paving
- Support industry wide commitment to reduce shingle landfill waste by 50%
- Minimize use of virgin raw materials

## Leading the charge towards true circularity

- Robust R&D to become truly circular
- Market demand for higher recycled content products
- Opportunities to partner with customers and contractors to reclaim materials



# A GROWING AND SUSTAINABLE BUSINESS



**Shingles are the preferred roofing solution in North America with strong demand fundamentals**



**CertainTeed exterior solutions are designed to work together**



**Roofing is ready to grow with new plants and enhanced service capabilities**



**Strong innovation focused on solutions and sustainability**

MAKING THE WORLD A  
BETTER HOME



THE WORLDWIDE  
LEADER IN LIGHT &  
SUSTAINABLE  
CONSTRUCTION



**GROW &  
IMPACT**  
2021-2025





# CERTAINTED ROOFING NORWOOD, MA



## PLANT TOUR INTRODUCTION



# WHAT YOU WILL SEE TODAY

## Plant Tour



## Product Displays



Please check the back of your badge to determine your group:

Group  
A

Group  
B

# REQUIRED PERSONAL PROTECTIVE EQUIPMENT FOR TOUR





# IMPORTANT TOUR REMINDERS

**Your safety is our first priority!**



**Remain in the Aisles**



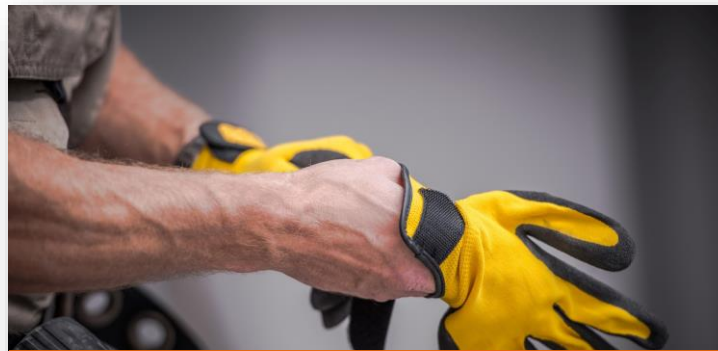
**Stay with your Tour guide**



**Watch for Vehicles**



**Keep hands clear of machines**



**Wear Protective Equipment**



**Stay Alert**



# GROW & IMPACT

## SAINT-GOBAIN RESEARCH NORTH AMERICA



**Todd DiNoia**

VP Innovation & R&D, SGNA

## SAFETY FIRST

Health, Safety, and  
Environment Procedures  
at Saint-Gobain Research



- If an alarm sounds, please wait and listen for instructions for Building location
- If Building is evacuated, please follow your host to the outside meeting point



- Eye protection is required in all laboratories
- You will not have safety shoes, so please do not approach equipment or attempt to pick up any heavy items



# SAINT-GOBAIN RESEARCH AT A GLANCE



## Focus innovation efforts on customer needs

Development of solutions to meet the specific needs of our local and global customers



## Adopt an open innovation approach

Partnerships with start-ups, scientific and academic cooperation, internal venturing



## Explore new business models

Marketplaces, product as a service, licensed technologies, etc.

Over  
**350**  
Years of innovation

More than  
**3,600**  
researchers

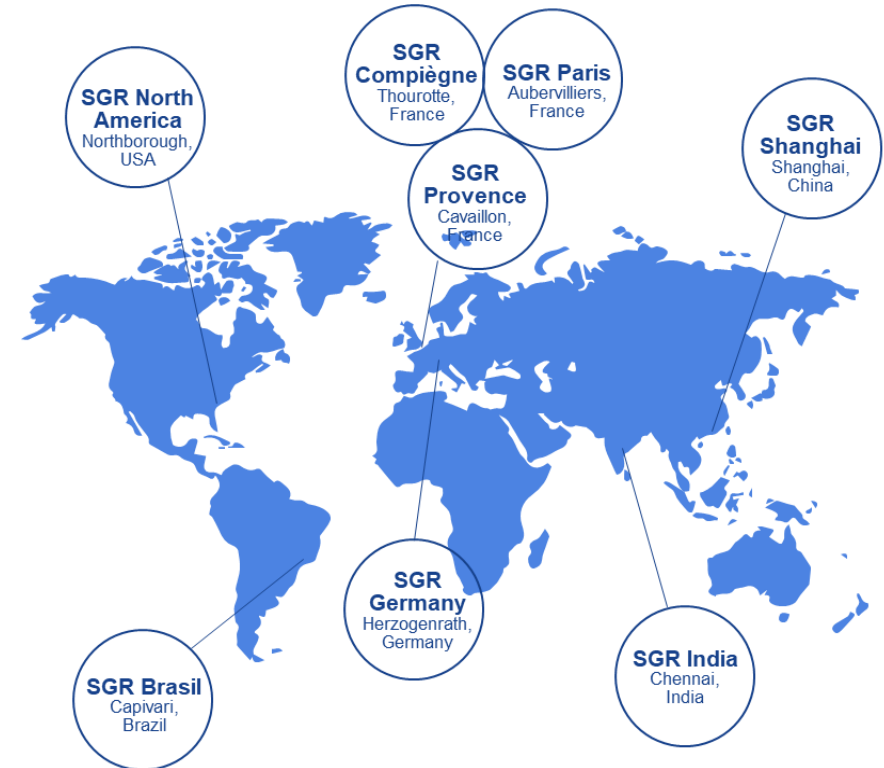
SGR  
**8**  
cross-business R&D centers

More than  
**3,400**  
Marketing people in contact with customers

Over  
**100**  
development centers

**1 in 4**  
Saint-Gobain products sold today did not exist five years ago

## 8 Global R&D Centers



Researchers at SGR North America are preparing our future by designing tomorrow's products and processes across a wide variety of markets and technologies.



North America

# Northborough, MA

Innovation Center

5 Research Buildings, 200,000 Sq. Ft. Space



Approximately

**350**

Researchers



More than

**100**

Researchers with  
PhDs



More than

**30**

Nationalities  
Represented



**36%**

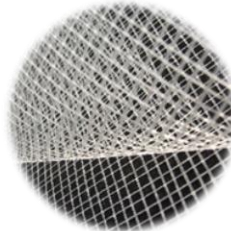
Women



**500**

Active Patent  
Families

**SAINT-GOBAIN  
RESEARCH  
NORTH AMERICA**

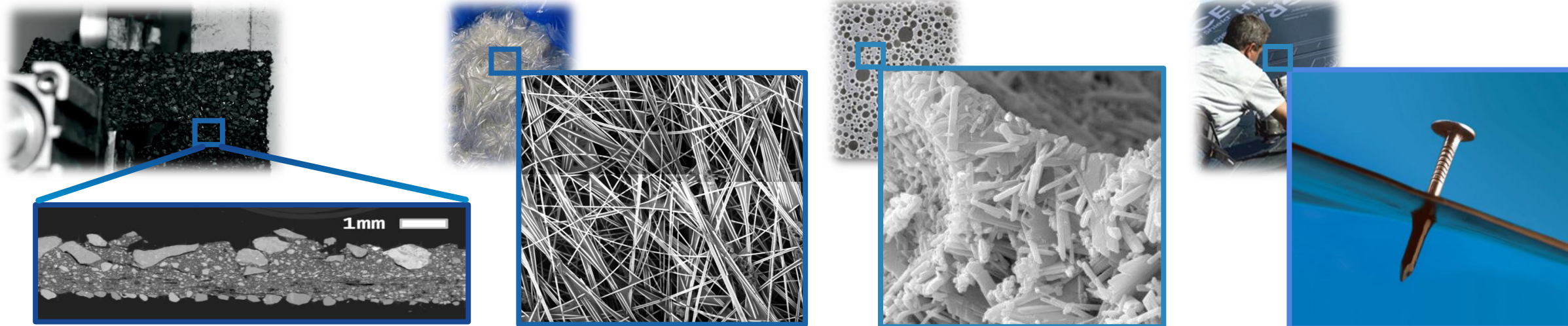








# MATERIALS EXPERTISE AT THE CORE OF OUR KNOW-HOW ...



**Fundamental material science & processing competencies across broad range of solutions**

Mechanics, Materials Science, Physics, Chemistry, Optics, Mathematics, Engineering

# WE UTILIZE ADVANCED COMPETENCIES TO INNOVATE



# OPEN INNOVATION



## **Nova External Venturing**

Driving borderless innovation for sustainable growth by connecting startups with the resources and experience of Saint-Gobain.



## **Saint-Gobain University Network**

International network of collaborations with the academic world



## **Government Agencies**

Connections with government funding agencies & National Laboratories in U.S. and Canada



## **Suppliers**

Strategic partnerships with top VIP material suppliers to leverage supplier technical expertise, capabilities, and resources as extension of our R&D teams





## ACADEMIC NETWORK OF COLLABORATION

### Saint-Gobain University Network

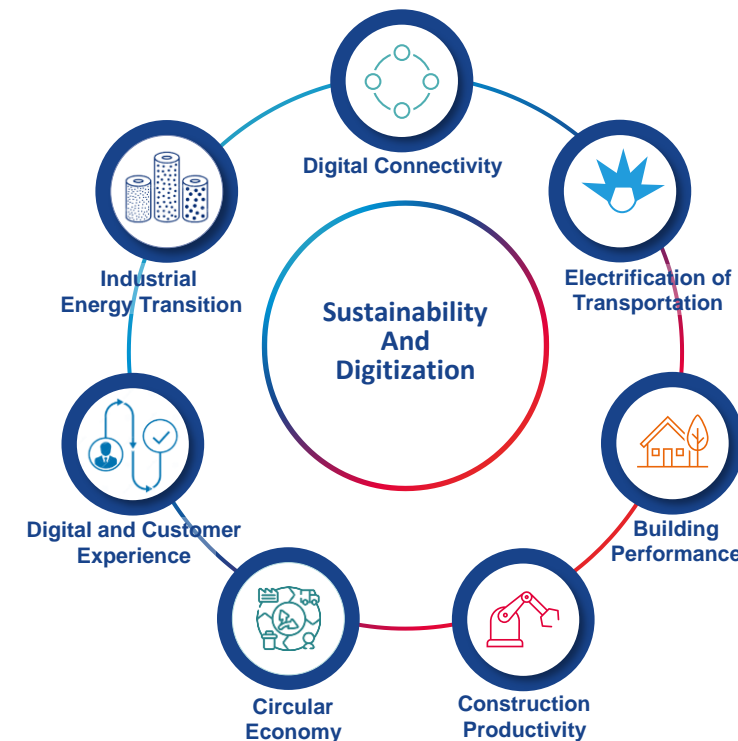


- Develop long-term interactions with the best research teams in our domain
- Knowledge of latest technological developments
- Hiring top talent universities

## START-UP COLLABORATIONS



Maintain strong external focus to identify top startups locally in areas of active investment



HYPERFRAME

CarbiCrete

ecomedes

unity  
homes

VOLUMETRIC  
BUILDING COMPANIES

Factory\_OS™

Greentown Labs

SAINT-GOBAIN

# OPEN INNOVATION

## Leveraging Government Agencies

Connections with government funding agencies and national laboratories in U.S. and Canada

Sustainable construction highlights

**Accelerating transformation of our energy footprint**



**Accelerating Process Innovation**



Gypsum Montreal  
Net-Zero  
Production  
(Scope 1 & 2)  
Vancouver Dryer  
Heat Recovery

Gypsum  
microwave  
calcination

## Supplier Innovation

Strategic partnerships with top material suppliers to leverage supplier technical expertise, capabilities, and resources as extension of R&D



**Generate new value by leveraging supplier R&D resources** more efficiently to support our innovation goals



**Become a preferred partner** to the **key strategic suppliers**, collaborating on innovative ideas and strengthen the business relationships



**Collaborate more efficiently:** Expand innovation ecosystem by partnerships within supplier network

# THE PATH FOR OUR SUCCESS



## Innovation: A key engine for growth and impact



**Great people and excellent capabilities**



**Create more value for our customers**



**Reinforce solutions offer**



**Leverage fully our local and global expertise**



**Invest in long-term horizon**



## GROUP A

Benoit Bazin and Todd DiNoia

- 
- 1 - Innovation in Materials and Processing Technology for Circular Economy (B3)**
  - 2 - Innovative Light Construction Assembly Solutions for Residential and Offsite Construction (Tent)**
  - 3 - VERIFI In-Transit Concrete Management System (Tent)**
  - 4 - Interior Products, Exterior Building Envelope, Building Sciences (B5)**

## GROUP B

Mark Rayfield and Sreedhar, N.

- 
- 4- Interior Products, Exterior Building Envelope, Building Sciences (B5)**
  - 1 - Innovation in Materials and Processing Technology for Circular Economy (B3)**
  - 2 - Innovative Light Construction Assembly Solutions for Residential and Offsite Construction (Tent)**
  - 3 – VERIFI In-Transit Concrete Management System (Tent)**

**2:45 PM – Q&A Together in Building 5 Assembly Lab**

# DISCLAIMER

*This presentation contains forward-looking statements with respect to Saint-Gobain's financial condition, results, business, strategy, plans and outlook. Forward-looking statements are generally identified by the use of the words "expect", "anticipate", "believe", "intend", "estimate", "plan" and similar expressions. Although Saint-Gobain believes that the expectations reflected in such forward-looking statements are based on reasonable assumptions as at the time of publishing this document, investors are cautioned that these statements are not guarantees of its future performance. Actual results may differ materially from the forward-looking statements as a result of a number of known and unknown risks, uncertainties and other factors, many of which are difficult to predict and are generally beyond Saint-Gobain's control, including but not limited to the risks described in the "Risk Factors" section of Saint-Gobain's Universal Registration Document and the main risks and uncertainties presented in the half-year 2023 financial report, both documents being available on Saint-Gobain's website ([www.saint-gobain.com](http://www.saint-gobain.com)). Accordingly, readers of this document are cautioned against relying on these forward-looking statements. These forward-looking statements are made as of the date of this document. Saint-Gobain disclaims any intention or obligation to complete, update or revise these forward-looking statements, whether as a result of new information, future events or otherwise, except as required by applicable laws and regulations. This presentation does not constitute any offer to purchase or exchange, nor any solicitation of an offer to sell or exchange securities of Saint-Gobain. No representation or warranty, express or implied, is made by Saint-Gobain or its managers, corporate officers, employees, contractors, representatives or advisors as to the accuracy or completeness of the information or opinions contained in this presentation.*