

# SAINT-GOBAIN GROW&IMPACT STRATEGY IN FRANCE

FRANCE SITE VISITS  
NOVEMBER 14, 2023



**Thierry FOURNIER**

CEO Southern Europe, Middle East & Africa



**Patrice RICHARD**

CEO Distribution France



# SAINT-GOBAIN: THE UNDISPUTED LEADER SHAPING LIGHT & SUSTAINABLE CONSTRUCTION IN FRANCE

#1

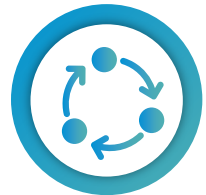
on the French **renovation market** both residential and non-residential  
~70% of our sales in France

#1

in **lightweight and sustainable construction**



We **shape our market** by influencing all our stakeholders



We outperform with **full-range solutions** across the entire value-chain



Brand & technology **leadership**



€12bn

2022 turnover in construction solutions

400k

Small & large key account customers

>80%

Of French tradespeople are our customers



Strong **local** footprint with an **outlet less than 9km away** from any construction **site**



# OUR MAIN UNDERLYING MARKET IS RENOVATION, WHICH REMAINS RESILIENT

## STRUCTURAL UNDERLYING DRIVERS FOR ENERGY EFFICIENT RENOVATION...

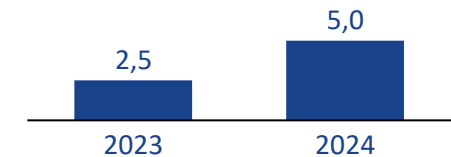
- The construction sector **represents 40%** of green-house gas emissions<sup>1</sup>
- >85% of the current building stock will **still exist** in 2050 and >70% needs to be **renovated**
- 7m to 8m **'thermal sieves'** (energy performance diagnosis – “DPE”- F&G) among total housing stock
- Mandatory **energy performance diagnosis** for each transaction (rent or buy)



## ...SUPPORTED BY A SOLID STIMULUS PACKAGE



**x2** in MaPrimeRénov' 2024 budget vs. 2023 (€bn)



**€2bn** of state loans for the energy efficiency renovation of 10,000 schools by 2027



**€1.2bn** fund to renovate social housing stock

# WE ARE A ONE-STOP-SHOP PROVIDER WITH THE COMPLETE RANGE OF SOLUTIONS FOR RESIDENTIAL RENOVATION



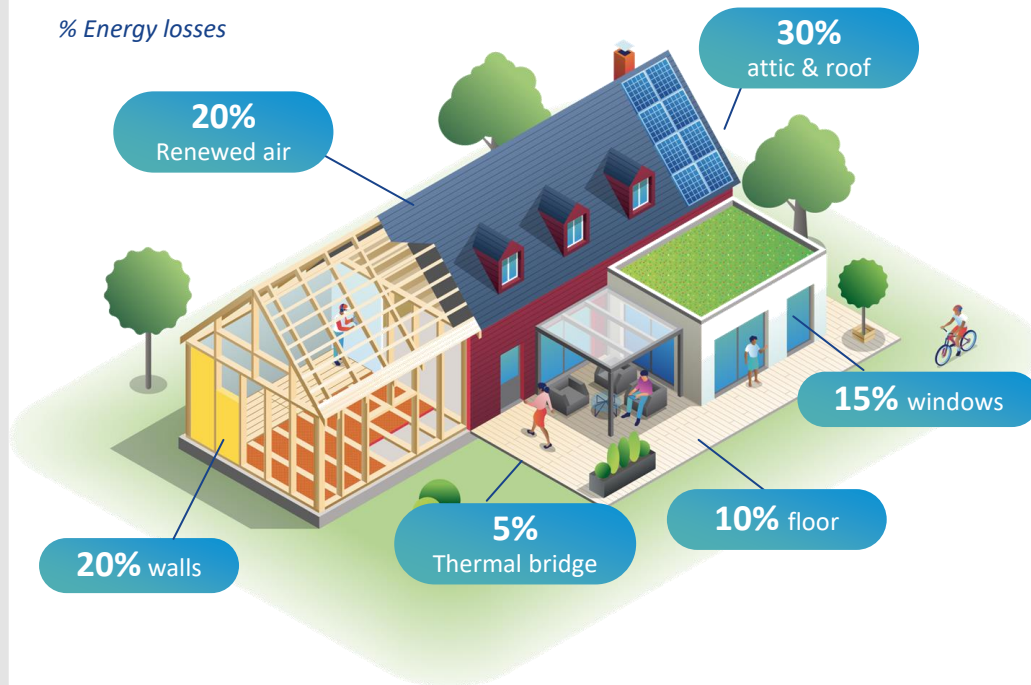
## SOLUTION USE CASE

Single-family house renovation<sup>1</sup>

33 products and services



% Energy losses



-70%  
energy bill  
reduction

## ENERGY EFFICIENCY

From energy-efficiency class

**G** to **C** for around ~€250/m<sup>2</sup>



4-5 years  
payback

## MONETARY SAVINGS

Reduced household **bills** and increased  
**property value** through **global** renovation



100k/year  
tradespeople  
trained & advised  
by Saint-Gobain

## PHYSICAL AND DIGITAL SERVICE SUPPORT

**Point.P**: deep care of our customers, via  
sales consultancy, digital tools, trainings,  
and certifications

1. Benefits quantified vs. energy efficiency performance of installed base



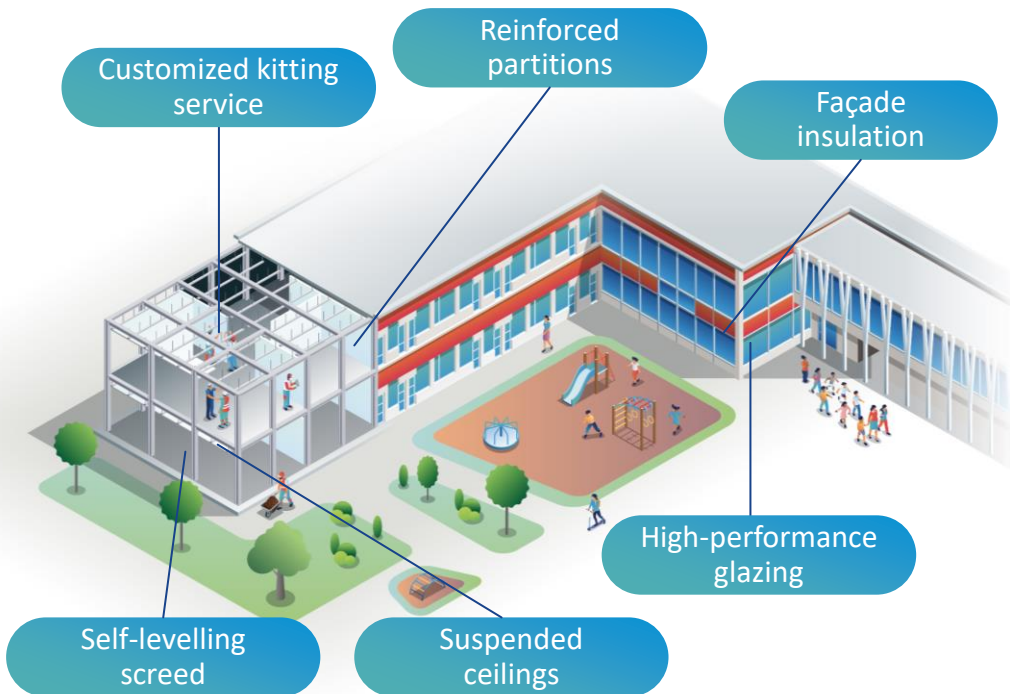
# WE ARE A ONE-STOP-SHOP PROVIDER WITH THE COMPLETE RANGE OF SOLUTIONS FOR PUBLIC BUILDINGS RENOVATION



## SOLUTION USE CASE

Education or healthcare buildings renovation<sup>1</sup>

20 products and services



-70%

Thermal energy spent

## ENERGY SAVINGS

More than 2/3 of public heating spent on healthcare and education buildings



-50%

Noise transmission

## WELL-BEING

High visual and acoustic performance products with improved indoor air quality



-45%

Installation time

## INCREASED PRODUCTIVITY

Thanks to kitting services

1. Benefits quantified vs. energy efficiency performance of installed base



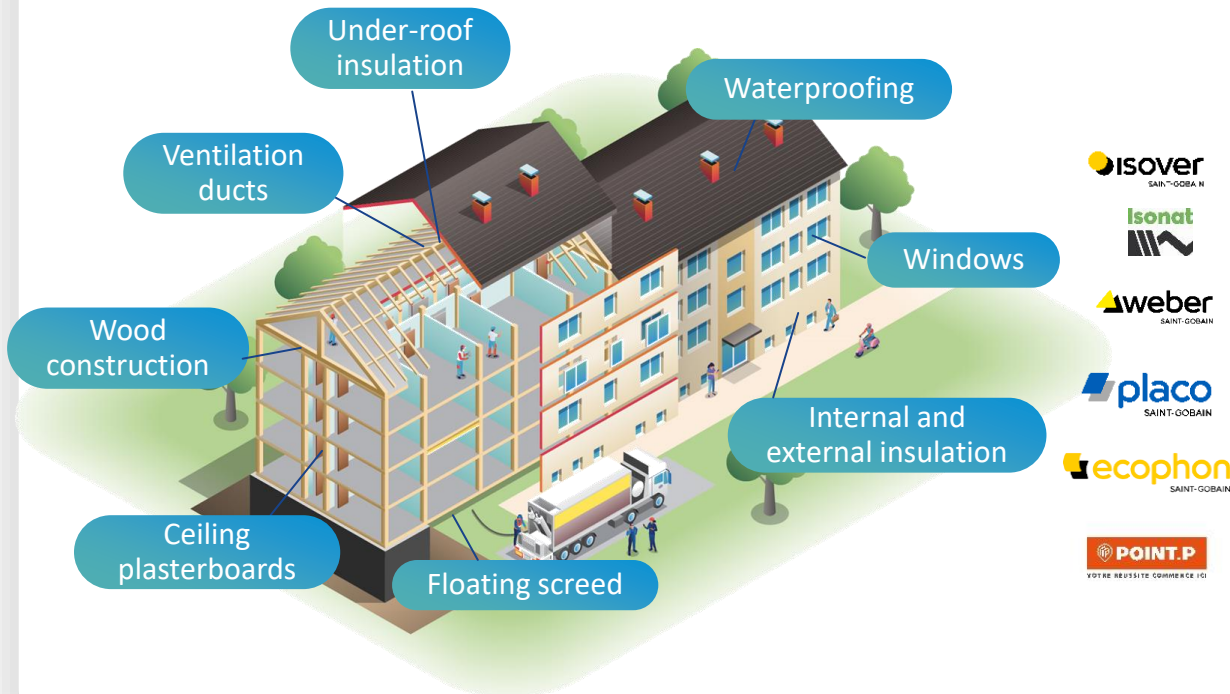
# WE ARE A ONE-STOP-SHOP PROVIDER WITH THE COMPLETE RANGE OF SOLUTIONS FOR LIGHT CONSTRUCTION



## SOLUTION USE CASE

Multi-family house new build<sup>1</sup>

21 products and services



-23%

CO<sub>2</sub> emissions over life cycle

## CO<sub>2</sub> FOOTPRINT

Sustainable solutions bringing **visual**, **thermal** and **acoustic** performance products with improved **indoor air quality**



60%

recyclable materials

## RESOURCE PRESERVATION

Up to **90%** of the whole building can be deconstructed and **re-used**



3 months

time saved

## EFFICIENT NEW CONSTRUCTION METHODS

Save **building time** thanks to productivity gains and/or off-site construction

1. Benefits quantified vs. French building standards

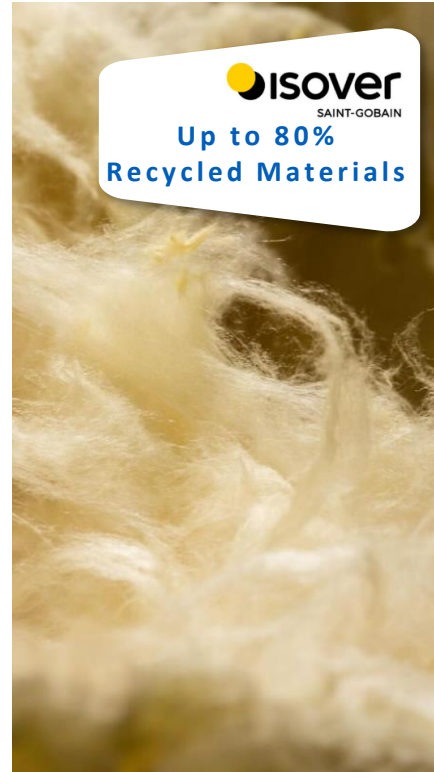




# WE LEAD THE FRENCH MARKET ON SUSTAINABLE AND LOW-CARBON OFFERS



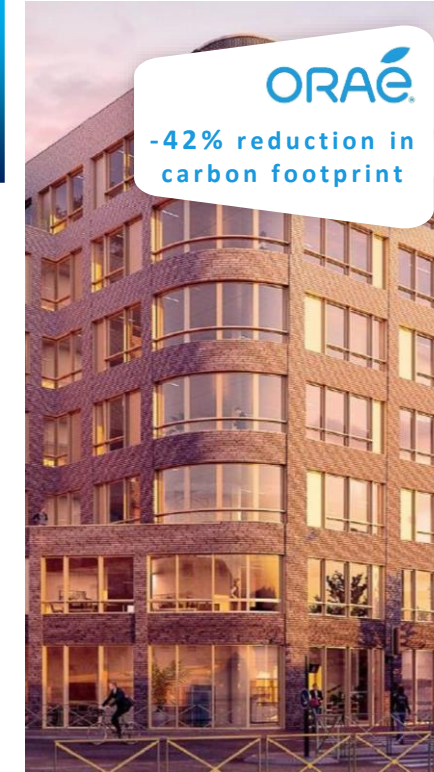
World's first  
**high-recycled content**  
plasterboard



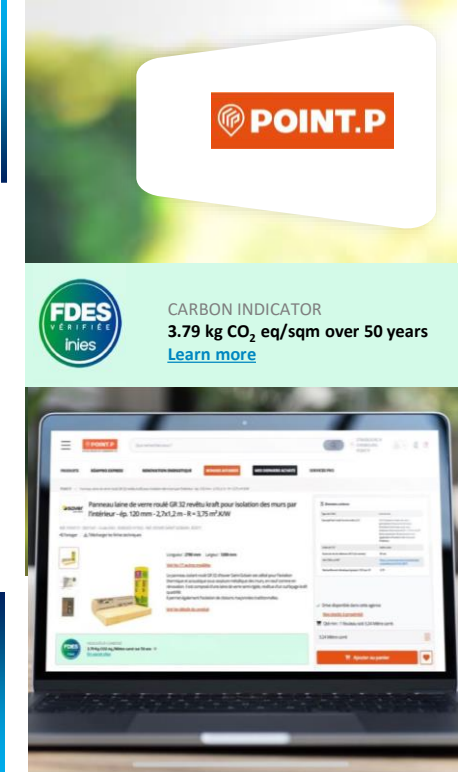
**New technology**  
for post-consumer  
glass wool recycling



A **dedicated range** for  
best-in-class  
sustainable products



World's first  
**low-carbon glass**



First builders merchant  
with **carbon footprint**  
data for **>100k products**

# WE LEAD ON MATERIALS & BUILDING CIRCULARITY WITH A DIFFERENTIATED SERVICE FOR PROJECT OWNERS



Design / Studies / Tender documents



Waste management on jobsite



Waste management outside of jobsites



Recycling partnership with the city of Paris

## Extended Producer Responsibility

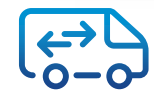


Olympic and paralympic village



**Ambitious** circular targets

**Tailored** action plan



Partner with **reliable** actors, ensuring Saint-Gobain **recycling systems traceability**



**Recycling & Reuse:**  
300 collection points at Point.P with best network for Valobat in France





## The Sustainable Construction Observatory

BY SAINT-GOBAIN

### Saint-Gobain's advocacy program

An ecosystem to strengthen the Group's influence and its positioning on sustainable construction



CONSTRUCTING  
A SUSTAINABLE  
FUTURE *by Saint-Gobain*

Check out our Sustainable Construction Magazine online!



### Sustainable construction talks

**Paris, July 2023** – Focus on energy efficient renovation with our stakeholders (architects, students, urban planners, opinion leaders ...)

Bringing together our stakeholders to debate the challenges of sustainable construction

# WE HAVE THE LARGEST OFFER AND PRESENCE ALONG THE FULL VALUE-CHAIN

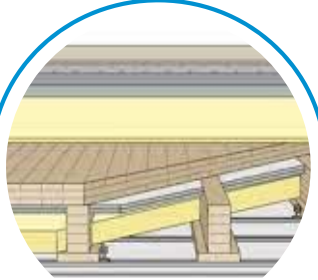
## Building science

Design & measure



## Complete systems

External thermal insulation



## Logistic services

Same-day delivery,  
2h click & collect



## Recycling

Collection points and  
sorting of construction  
waste at Point.P



## Co-development with key customers

New façade systems for  
wood construction

## Sales services

Merchandising and  
specification

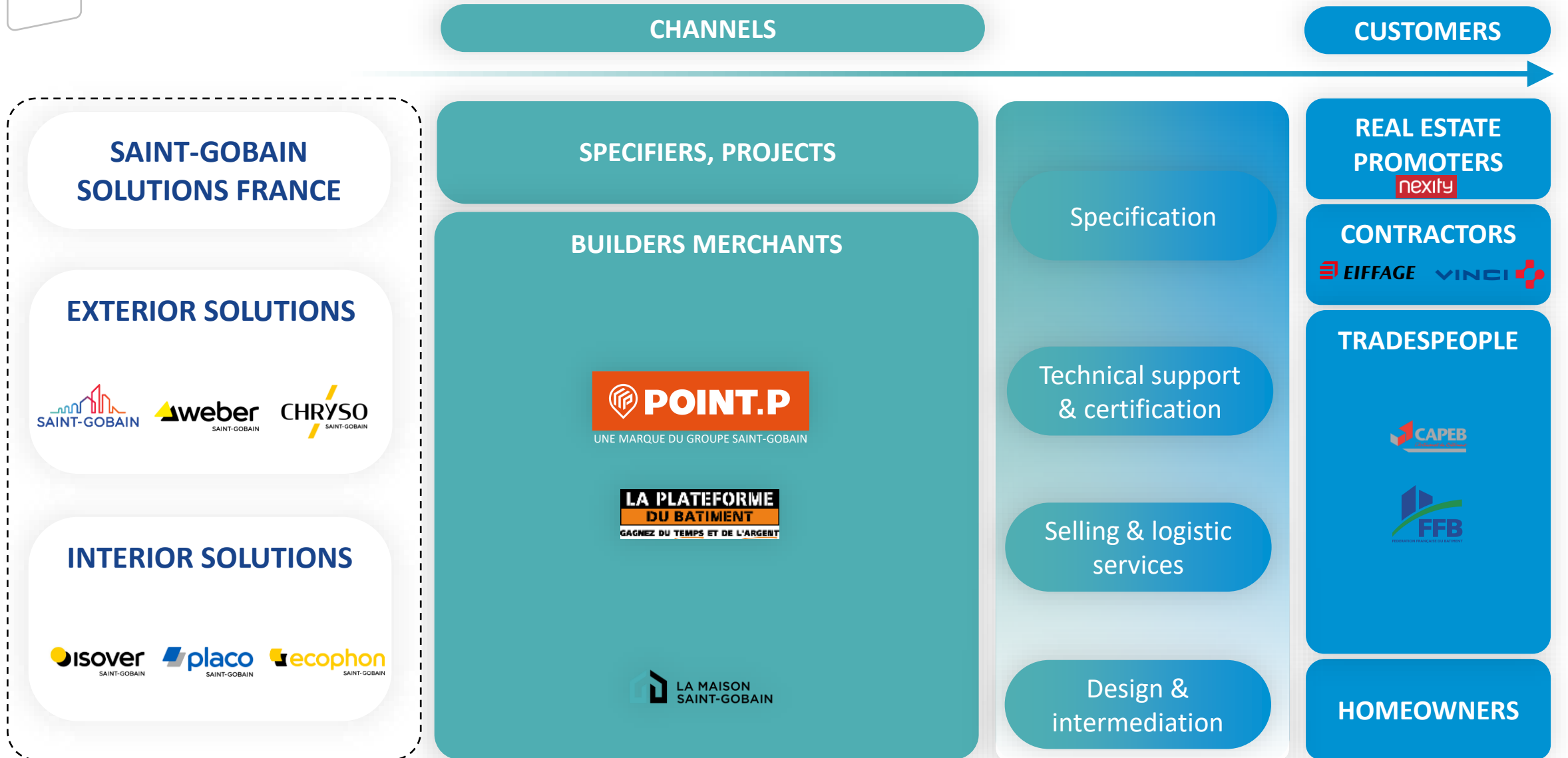


## Contractors & tradespeople training and certification

on energy-efficient  
renovation



# WE SERVE OUR BROAD CUSTOMER BASE THROUGH ALL CHANNELS





# SAINT-GOBAIN FRANCE: PREFERRED CONTRACTOR'S PARTNER FOR LARGE PROJECTS

## 1. SPECIFICATION AND DESIGN OFFICE

Most major French projects in our portfolio



GREEN CERTIFIED BUILDINGS



Turnover & # of Saint-Gobain solutions  
green building vs. standard project

## 2. PROVIDING TECHNICAL AND INNOVATIVE SOLUTIONS

INTERIOR DESIGN



PREFAB



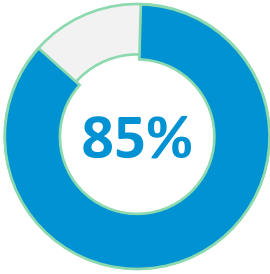
VENTILATED FAÇADES



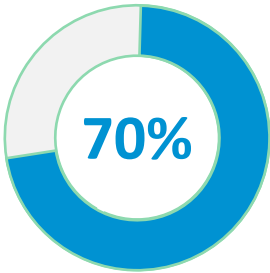
PASSIVE FIRE PROTECTION



# SAINT-GOBAIN FRANCE: PREFERRED BUILDERS MERCHANT PARTNER FOR TRADESPEOPLE

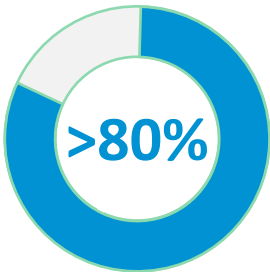


of sales towards  
small professionals  
and contractors



of sales in **renovation**  
with strong leadership on  
energy efficiency

**RGE**



of French tradespeople are our customers  
**380,000 active customers / 450,000 French professionals**



# WE LEVERAGE OUR SAINT-GOBAIN MERCHANTING LEADERSHIP FOR HIGHER GROWTH & PROFITABILITY

## An established leadership



bigger than n°2 player and around 30% market share



Best-in-class margin



customers in 2022 vs. 2018

## Differentiating services

~2,000

sales **outlets** (each 9km) and 300 collection points for recycling

D/D+1

same day or next-day logistics anywhere in France



*"Save time and money"*

~10,000

Salespeople including 1,000 highly technical experts dedicated to energy efficiency



# WITH CAP RENOV WE PROVIDE A FULL INTERACTIVE DIGITAL SOLUTION FOR TRADESPEOPLE ON ENERGY RENOVATION DIAGNOSIS AND PROBLEM SOLVING

## CAPRENOV

A fee-based service - €149/year

20,000 monthly simulations



**génération  
artisans**  
L'excellence en mouvement

18,000 member  
companies



Energy renovation  
tour of France  
70 dates  
2,500 customers  
met

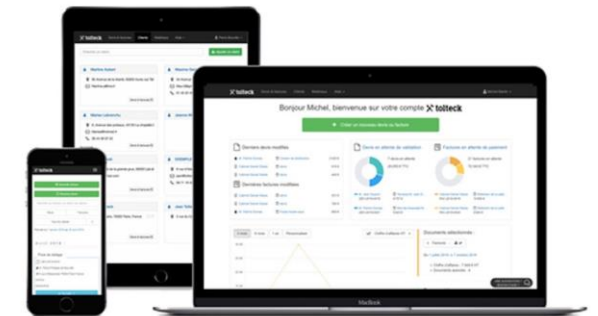
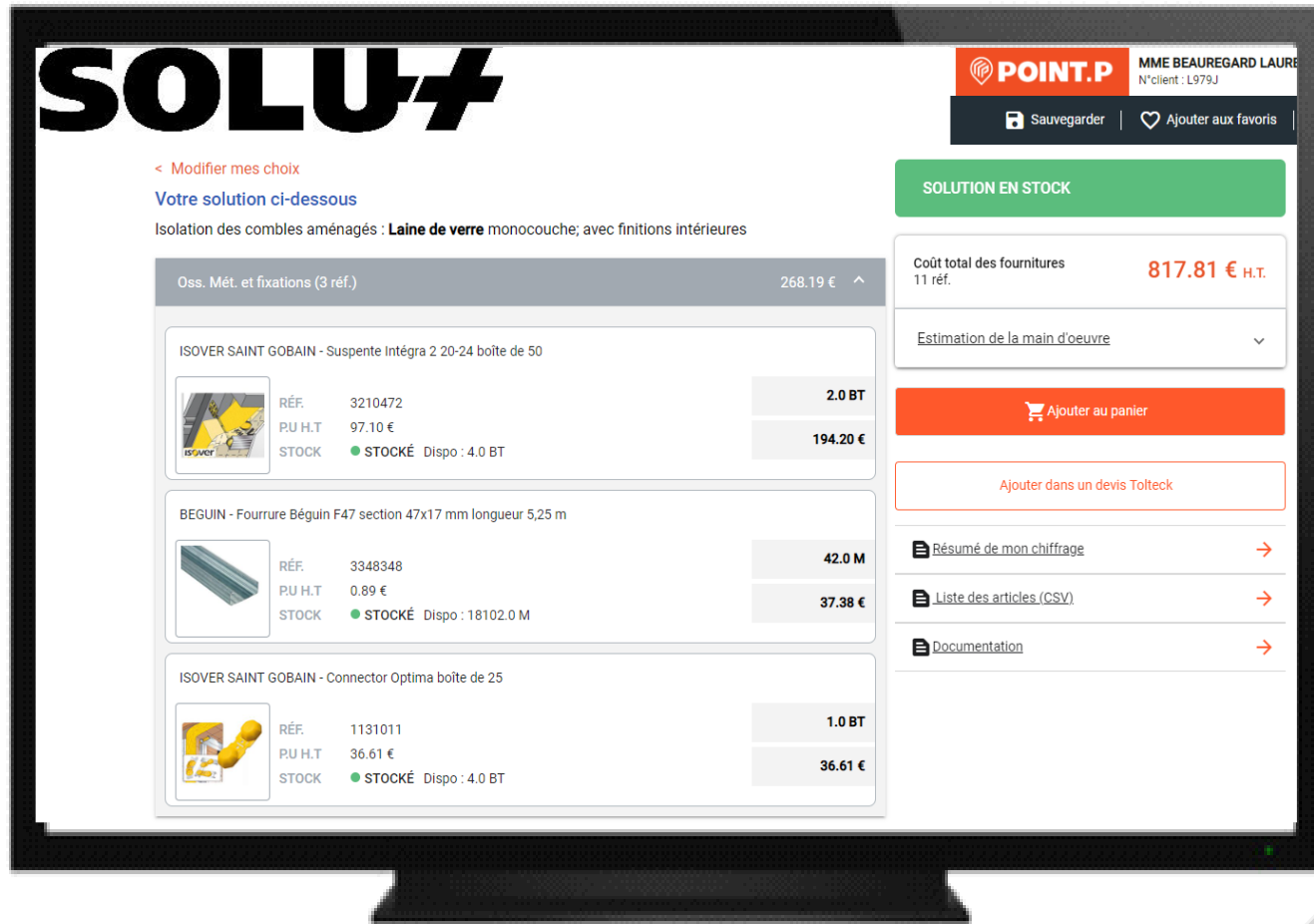


**CAP RENOV+**

# WITH SOLU+ WE HELP OUR PROFESSIONAL CUSTOMERS SAVE TIME AND MONEY ON JOB CONFIGURATION & QUOTES

80 types  
of construction projects  
with **COMPLETE TECHNICAL  
SOLUTIONS**

**30,000** monthly quotations



 **tolteck**

A fee-based service - €228/year



# WE INVEST IN AVAILABILITY AND SKILLS OF OUR PROFESSIONAL CUSTOMERS TOWARDS ENERGY EFFICIENT RENOVATION



**OBJECTIFRGE**

**POINT.P**  
VOTRE RÉUSSITE COMMENCE ICI

**ACTION RÉNOVATION ÉNERGÉTIQUE**

**IL EST TEMPS DE RÉUSSIR ENSEMBLE CET IMMENSE CHANTIER !**

POINT.P met les bouchées doubles pour accompagner les artisans sur le sujet de la rénovation énergétique en leur proposant la qualification RGE remboursée.

**COMMENT ?**

Chez POINT.P, nous avons tout pour réussir le défi de la rénovation énergétique. Nous avons les matériaux, les services et les experts, mais nous devons le faire savoir.

Découvrez en avant-première notre dispositif inédit pour faire de POINT.P l'acteur incontournable de la rénovation énergétique.

**QUALIFICATION RGE REMBOURSEE**

**ET SUR LES ROUTES DE FRANCE AVEC LA TOURNÉE ACTION RÉNOVATION ÉNERGÉTIQUE !**

**L'école du toit**  
asturienne

**école des bâtisseurs**

**19°C** L'ÉCOLE DU GÉNIE CLIMATIQUE

Help **tradespeople** become “RGE<sup>1</sup>”-certified and therefore **eligible for public subsidies**

**Apprentices:**  
Saint-Gobain schools for sustainable construction

~100k tradespeople trained and advised by Saint-Gobain per year

# SAINT-GOBAIN GROW&IMPACT STRATEGY IN FRANCE

FRANCE SITE VISITS  
NOVEMBER 14, 2023



**Thierry FOURNIER**

CEO Southern Europe, Middle East & Africa



**Patrice RICHARD**

CEO Distribution France







WELCOME @ VAUJOURS PLANT

November 14, 2023



# VAUJOURS PLANT IS THE LARGEST PLASTERBOARD PLANT IN EUROPE

WE HAVE A STRONG STRATEGIC ADVANTAGE WITH QUARRIES OWNERSHIP AND RECYCLING CAPACITIES



330 employees



70 million m<sup>2</sup> plasterboard ⇔ 200k houses / year



40k companies are using Vaujours products  
(residential & non-residential / new buildings & renovation)



A large local market  
20 million people live within a 150km radius



Placo recycling since 2008 leading the French market

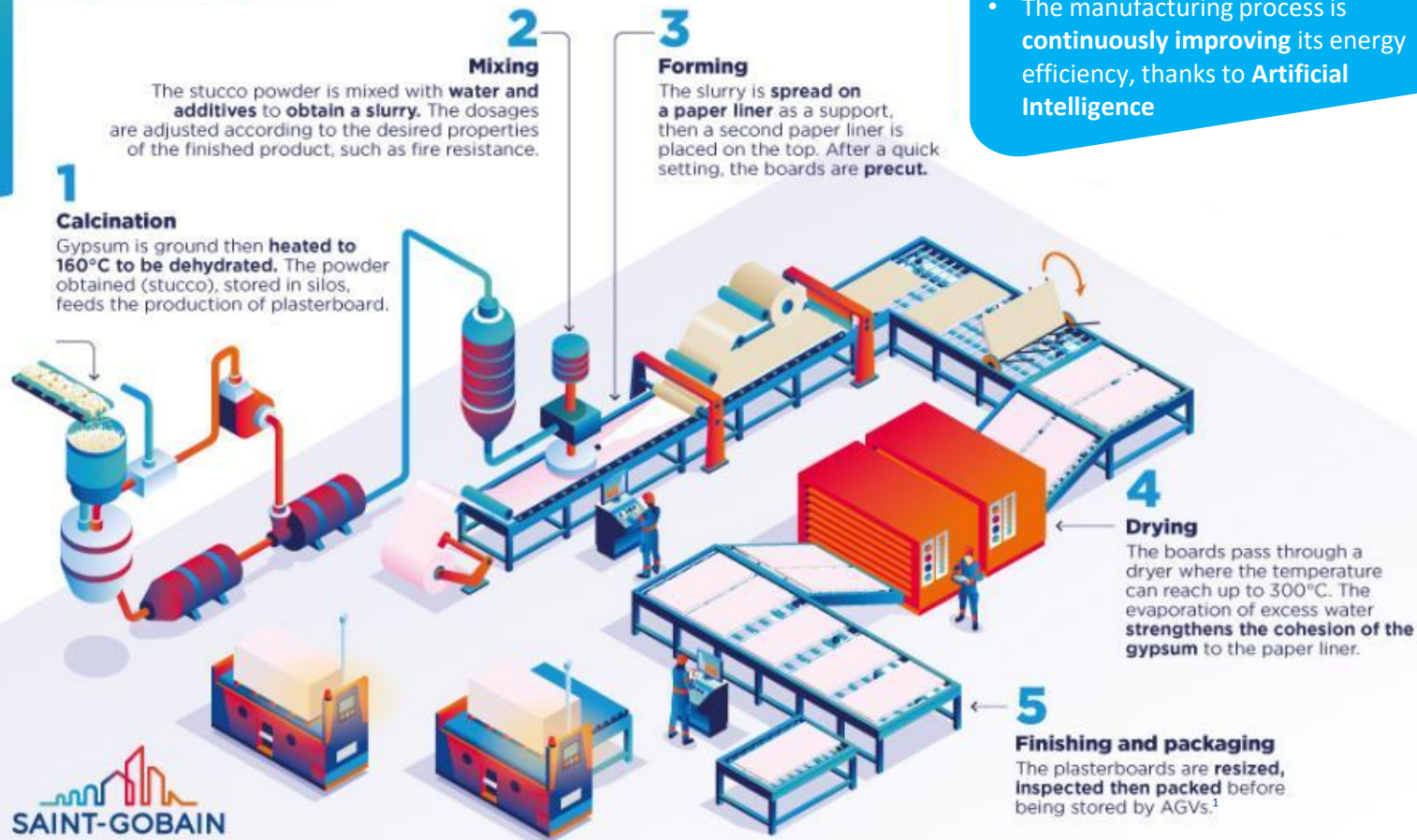




# THE PLASTERBOARD MANUFACTURING PROCESS

ZOOM ON

## PLASTERBOARD MANUFACTURING AT SAINT-GOBAIN



### DID YOU KNOW ?

- Saint-Gobain uses up to 50% recycled materials in its plasterboard production
- The manufacturing process is continuously improving its energy efficiency, thanks to Artificial Intelligence



# GYPSUM PLASTER AND PLASTERBOARD ARE FAST GROWING LIGHT & SUSTAINABLE CONSTRUCTION SOLUTIONS

## Gypsum

A natural resource  
Raw material for plaster



## Plaster

A durable building material

- Fire-resistant
- Moisture regulator
- Thermal & acoustic insulator



## Plasterboard

- Easy to install
- Cost efficient
- For light & sustainable construction



a 100% recyclable  
material

Placo® recycling launched in 2008 – first French  
recycling program for plasterboard



## SITE TOUR - YOUR GUIDES



**Aymeric DAUDET**

Placoplatre  
Industrial Director

GROUP 1



**Alain-Pierre THIVEND**

Vaujours  
Plant Manager

GROUP 2



**Eric BARNASSON**

Saint-Gobain Solutions France  
Development and Innovation Manager

GROUP 3



**Nicolas BRETAULT**

Isover Placo® Customer Marketing and  
Training Responsible

GROUP 4