H1 2018 Results and Outlook

July 27, 2018
1. HIGHLIGHTS
2. H1 2018 RESULTS
3. OUTLOOK AND ACTION PLAN FOR H2
4. STRATEGY
### H1 2018 KEY FIGURES

<table>
<thead>
<tr>
<th>Category</th>
<th>Actual</th>
<th>Like-for-like</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales</td>
<td>€20.8bn</td>
<td>+1.9%</td>
</tr>
<tr>
<td>Operating income</td>
<td>€1,469m</td>
<td>+0.3%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Category</th>
<th>Actual</th>
<th>Like-for-like</th>
</tr>
</thead>
<tbody>
<tr>
<td>Operating margin</td>
<td>7.1%</td>
<td>-10bp</td>
</tr>
<tr>
<td>Recurring net income</td>
<td>€802m</td>
<td>+6.8%</td>
</tr>
<tr>
<td>Net attributable income</td>
<td>€1,219m</td>
<td>+61.7%</td>
</tr>
<tr>
<td>Net debt</td>
<td>€9,294m</td>
<td>2.2x EBITDA</td>
</tr>
</tbody>
</table>

Changes based on H1-18 vs H1-17
ORGANIC GROWTH AT 4.9% IN H1; 8.0% IN Q2

WESTERN EUROPE
» France: good growth, particularly in Q2
» Other Western European countries: further growth driven by the uptick in Q2

NORTH AMERICA
» Strong momentum in industrial markets
» Robust growth in construction businesses

ASIA AND EMERGING COUNTRIES
» Acceleration in growth across all regions, including Latin America, despite the May strike in Brazil
HIGHLIGHTS

» Acquisition of 10.75% of Sika’s capital on excellent financial terms (€781m in net income)

» 13 acquisitions in H1 and 3 being finalized in July

» Capital expenditure focused on growth capex in emerging countries, productivity and digital transformation

» €150m in cost savings versus H1 2017

» 8.8 million shares bought back in H1, an acceleration versus 2017 (8.3 million shares bought back in 2017 as a whole)
1. HIGHLIGHTS
2. H1 2018 RESULTS
   1. GROUP
   2. BUSINESSES
   3. REGIONS
3. OUTLOOK AND ACTION PLAN FOR H2
4. STRATEGY
Depreciation of the **US dollar, Brazilian real, Nordic krona** and other Asian and emerging market currencies against the euro.

- Impact of acquisitions made in **Asia and emerging countries**, in new **niche technologies** and services, and to **consolidate** our strong positions.

- **Inflationary** raw material and energy cost environment.

- **Better prices and volumes** in all Business Sectors and regions.
QUARTERLY ORGANIC GROWTH
(% change in sales on a like-for-like basis)

<table>
<thead>
<tr>
<th>Period</th>
<th>H1/H1: +2.9%*</th>
<th>H2/H2: +2.3%*</th>
<th>Volumes</th>
</tr>
</thead>
<tbody>
<tr>
<td>H1/H2: +6.0%</td>
<td>+7.6%</td>
<td>+6.0%</td>
<td>+8.0%</td>
</tr>
<tr>
<td>H2/H2: +6.0%</td>
<td>+6.5%</td>
<td>+3.8%</td>
<td>+5.0%</td>
</tr>
<tr>
<td>H1/H1: +4.9%</td>
<td>+5.6%</td>
<td>+3.6%</td>
<td>+3.0%</td>
</tr>
</tbody>
</table>

Volumes

-1.2% -0.1%

*excl. Verallia as from Q2-2015

<table>
<thead>
<tr>
<th>Period</th>
<th>Operating Income (€m)</th>
<th>Group Margin (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>H1-2016</td>
<td>1,368</td>
<td>7.0%</td>
</tr>
<tr>
<td>H1-2017</td>
<td>1,465</td>
<td>7.2%</td>
</tr>
<tr>
<td>H1-2018</td>
<td>1,469</td>
<td>7.1%</td>
</tr>
</tbody>
</table>

- **+1.7%** like-for-like
- **+0.3%** on a reported basis
- **Group margin**: 7.1%
# BUSINESS INCOME

(€m)

<table>
<thead>
<tr>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td><strong>Operating income</strong></td>
<td>1,465</td>
<td>1,469</td>
<td>+0.3%</td>
<td>+1.7%</td>
</tr>
<tr>
<td>Non-operating costs</td>
<td>(166)</td>
<td>(54)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>o/w provision for asbestos-related litigation</td>
<td>(45)</td>
<td>(45)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>o/w other expenses</td>
<td>(121)</td>
<td>(9)</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Other business income (expenses)</strong></td>
<td>7</td>
<td>(296)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>o/w disposal gains (losses)</td>
<td>7</td>
<td>(11)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>o/w asset write-downs and other</td>
<td>0</td>
<td>(285)</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Business income</strong></td>
<td>1,306</td>
<td>1,119</td>
<td>-14.3%</td>
<td></td>
</tr>
</tbody>
</table>
Abestos-related litigation in the US

- **~US$ 74m** paid out over the 12 months to end-June 2018 *(versus US$ 76 at end-2017)*

- **€45m** accrual to the provision in H1 2018, bringing the total balance sheet provision to US$ 576m at end-June 2018 *(US$ 555m at end-2017)*

<table>
<thead>
<tr>
<th></th>
<th>H1-2017</th>
<th>FY-2017</th>
<th>H1-2018*</th>
</tr>
</thead>
<tbody>
<tr>
<td>New claims</td>
<td>1,600</td>
<td>3,100</td>
<td>1,300</td>
</tr>
<tr>
<td>Settled claims</td>
<td>2,300</td>
<td>3,900</td>
<td>1,500</td>
</tr>
<tr>
<td>Outstanding claims</td>
<td>34,400</td>
<td>34,300</td>
<td>34,100</td>
</tr>
</tbody>
</table>

*estimated*
### Business Income

<table>
<thead>
<tr>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td><strong>Business income</strong></td>
<td>1,306</td>
<td>1,119</td>
<td></td>
</tr>
<tr>
<td><strong>Net financial income (expense)</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- o/w Sika</td>
<td></td>
<td>601</td>
<td></td>
</tr>
<tr>
<td>- o/w finance costs</td>
<td>(231)</td>
<td>(209)</td>
<td></td>
</tr>
<tr>
<td><strong>Average cost of gross debt (at June 30)</strong></td>
<td>2.7%</td>
<td>2.5%</td>
<td></td>
</tr>
<tr>
<td><strong>Income tax</strong></td>
<td></td>
<td>(297)</td>
<td>(265)</td>
</tr>
<tr>
<td><strong>Tax rate on recurring net income</strong></td>
<td>27%</td>
<td>25%</td>
<td></td>
</tr>
<tr>
<td><strong>Net attributable income</strong></td>
<td>754</td>
<td>1,219</td>
<td>+61.7%</td>
</tr>
<tr>
<td><strong>EPS (€)</strong></td>
<td>1.36</td>
<td>2.23</td>
<td>+64.0%</td>
</tr>
<tr>
<td><strong>Recurring net income</strong></td>
<td>751</td>
<td>802</td>
<td>+6.8%</td>
</tr>
<tr>
<td><strong>Recurring EPS (€)</strong></td>
<td>1.35</td>
<td>1.47</td>
<td>+8.9%</td>
</tr>
</tbody>
</table>
CASH FLOW FROM OPERATIONS * AND CAPEX
(€m and % of sales)

<table>
<thead>
<tr>
<th></th>
<th>H1-2017</th>
<th>H1-2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Free cash flow</td>
<td>-14.9%</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Capex</td>
<td>6.9%</td>
<td>4.0%</td>
</tr>
<tr>
<td>Op. cash flow</td>
<td>4.8%</td>
<td>2.7%</td>
</tr>
<tr>
<td></td>
<td>1,410</td>
<td>1,398</td>
</tr>
<tr>
<td></td>
<td>983</td>
<td>837</td>
</tr>
</tbody>
</table>

*excluding the tax impact of capital gains and losses on disposals, asset write-downs and material non-recurring provisions
TIGHT REIN ON OPERATING WCR
(at June 30, €m and no. of days)

Ongoing tight rein on operating WCR
Sika transaction on excellent financial terms

- Acquisition of 10.75% of Sika for a total cash amount of €0.93bn (market value at 26/7/2018: €1.87bn)
- Changes in the value of the Sika share price after May 11, 2018 are recorded in equity
- Saint-Gobain now Sika’s top shareholder
- Impact on 2018 financial statements: increase of €781m in net income

€356m in investments in securities excluding Sika

- +162% on H1 2017
- 13 acquisitions

€389m in share buybacks

- In line with the Group’s objectives, buyback of 8.8 million shares
- Cancellation of 6 million shares
- Reduction in the number of outstanding shares to 546.9 million at June 30, 2018 (versus 554.4 million at June 30, 2017)
**NET DEBT AND SHAREHOLDERS’ EQUITY (€bn)**

<table>
<thead>
<tr>
<th></th>
<th>06-2016</th>
<th>12-2016</th>
<th>06-2017</th>
<th>12-2017</th>
<th>06-2018</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Net debt</strong></td>
<td>6.6</td>
<td>5.6</td>
<td>6.8</td>
<td>6.0</td>
<td>9.3</td>
</tr>
<tr>
<td><strong>Shareholders’ equity</strong></td>
<td>18.4</td>
<td>19.1</td>
<td>18.8</td>
<td>18.9</td>
<td>19.3</td>
</tr>
<tr>
<td><strong>Net debt/shareholders’ equity</strong></td>
<td>36%</td>
<td>29%</td>
<td>36%</td>
<td>32%</td>
<td>48%</td>
</tr>
<tr>
<td><strong>Net debt/EBITDA</strong></td>
<td>1.7</td>
<td>1.4</td>
<td>1.7</td>
<td>1.4</td>
<td>2.2</td>
</tr>
</tbody>
</table>

*EBITDA = Operating income + operating depreciation/amortization over a 12-month period*

Strong balance sheet maintained
1. HIGHLIGHTS
2. H1 2018 RESULTS
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**INNOVATIVE MATERIALS**

- Organic growth:
  - Volume: +4.2%
  - Prices: +1.8%

- Operating income:
  - €651m
  - Margin: 12.3%

- Capex: €241m

H1-18 vs H1-17
FLAT GLASS

Organic growth

+3.5%

Operating income

€229m

Capex

€165m

Sales (€m)

<table>
<thead>
<tr>
<th></th>
<th>H1-16</th>
<th>H1-17</th>
<th>H1-18</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales</td>
<td>2,656</td>
<td>2,865</td>
<td>2,852</td>
</tr>
</tbody>
</table>

Operating income and margin (€m - %)

<table>
<thead>
<tr>
<th></th>
<th>H1-16</th>
<th>H1-17</th>
<th>H1-18</th>
</tr>
</thead>
<tbody>
<tr>
<td>Income</td>
<td>234</td>
<td>284</td>
<td>229</td>
</tr>
<tr>
<td>Margin</td>
<td>8.8%</td>
<td>9.9%</td>
<td>8.0%</td>
</tr>
</tbody>
</table>

H1-18 vs H1-17
Organic growth +9.2% (vol. +7.9% prices +1.3%) Operating income €422m margin 17.3% Capex €76m

Sales (€m)

<table>
<thead>
<tr>
<th></th>
<th>H1-16</th>
<th>H1-17</th>
<th>H1-18</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales</td>
<td>2,264</td>
<td>2,387</td>
<td>2,441</td>
</tr>
</tbody>
</table>

Operating income and margin (€m - %)

<table>
<thead>
<tr>
<th></th>
<th>H1-16</th>
<th>H1-17</th>
<th>H1-18</th>
</tr>
</thead>
<tbody>
<tr>
<td>Income</td>
<td>318</td>
<td>359</td>
<td>422</td>
</tr>
<tr>
<td>Margin</td>
<td>14.0%</td>
<td>15.0%</td>
<td>17.3%</td>
</tr>
</tbody>
</table>

H1-18 vs H1-17
**CONSTRUCTION PRODUCTS**

**Organic growth**
- +6.8% (vol. +3.3%, prices +3.5%)

**Operating income**
- €560m (margin 8.6%)

**Capex**
- €195m

H1-18 vs H1-17
Organic growth

- +7.1% (vol.)
- +3.0% (prices)
- +4.1%

Operating income

- €353m
- Margin 9.9%

Capex

- €121m

Sales (€m)

<table>
<thead>
<tr>
<th></th>
<th>H1-16</th>
<th>H1-17</th>
<th>H1-18</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>3,297</td>
<td>3,417</td>
<td>3,579</td>
</tr>
</tbody>
</table>

Operating income and margin (€m - %)

<table>
<thead>
<tr>
<th></th>
<th>H1-16</th>
<th>H1-17</th>
<th>H1-18</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>335</td>
<td>337</td>
<td>353</td>
</tr>
<tr>
<td></td>
<td>10.2%</td>
<td>9.9%</td>
<td>9.9%</td>
</tr>
</tbody>
</table>

H1-18 vs H1-17
EXTERIOR SOLUTIONS

Organic growth

+6.6%

vol. +3.8%

prices +2.8%

Operating income

€207m

margin 7.0%

Capex

€74m

Sales (€m)

H1-16: 2,753  
H1-17: 2,958  
H1-18: 2,947

Operating income and margin (€m - %)

H1-16: 229  8.3%  
H1-17: 249  8.4%  
H1-18: 207  7.0%

H1-18 vs H1-17
Organic growth +3.1% (vol. +0.8% prices +2.3%)

Operating income €254m (margin 2.7%)

Capex €100m

Sales (€m)

<table>
<thead>
<tr>
<th></th>
<th>H1-16</th>
<th>H1-17</th>
<th>H1-18</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales</td>
<td>9,104</td>
<td>9,344</td>
<td>9,550</td>
</tr>
</tbody>
</table>

Operating income and margin (€m - %)

<table>
<thead>
<tr>
<th></th>
<th>H1-16</th>
<th>H1-17</th>
<th>H1-18</th>
</tr>
</thead>
<tbody>
<tr>
<td>H1-16</td>
<td>253</td>
<td>248</td>
<td>254</td>
</tr>
<tr>
<td>2.8%</td>
<td>2.7%</td>
<td>2.7%</td>
<td></td>
</tr>
</tbody>
</table>

H1-18 vs H1-17

Sales Indust. assets at end-June 2018

<table>
<thead>
<tr>
<th></th>
<th>H1-2018 Sales</th>
<th>Indust. assets at end-June 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales</td>
<td>46%</td>
<td>26%</td>
</tr>
</tbody>
</table>
1. HIGHLIGHTS
2. H1 2018 RESULTS
   1. GROUP
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SALES TRENDS BY REGION
(% change in H1-2018/H1-2017 like-for-like sales)

North America
+9.4%

Asia & emerging countries
+8.2%

France
+3.1%

Other Western Europe
+3.6%

Asia (7%):
+4.5%

Latin America (6%):
+12.5%

Eastern Europe (5%):
+6.6%

Africa & Middle East (2%):
+16.0%

Nordics (13%):
+4.0%

UK (10%):
+1.0%

Germany (9%):
+1.3%

Southern Europe (5%):
+8.5%

* breakdown of H1-2018 sales

+4.9% like-for-like
OPERATING INCOME BY REGION
(€m and % of sales)

<table>
<thead>
<tr>
<th>Region</th>
<th>H1-2016</th>
<th>H1-2017</th>
<th>H1-2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>France</td>
<td>124</td>
<td>133</td>
<td>185</td>
</tr>
<tr>
<td>Other Western Europe</td>
<td>513</td>
<td>521</td>
<td>487</td>
</tr>
<tr>
<td>North America</td>
<td>310</td>
<td>334</td>
<td>310</td>
</tr>
<tr>
<td>Asia and emerging countries</td>
<td>421</td>
<td>477</td>
<td>487</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Region</th>
<th>H1-2016</th>
<th>H1-2017</th>
<th>H1-2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>France</td>
<td>2.4%</td>
<td>2.5%</td>
<td>3.3%</td>
</tr>
<tr>
<td>Other Western Europe</td>
<td>5.9%</td>
<td>6.0%</td>
<td>5.4%</td>
</tr>
<tr>
<td>North America</td>
<td>11.6%</td>
<td>11.8%</td>
<td>11.1%</td>
</tr>
<tr>
<td>Asia and emerging countries</td>
<td>10.6%</td>
<td>10.7%</td>
<td>10.8%</td>
</tr>
</tbody>
</table>
EBITDA AND CAPEX BY REGION
(H1-2018, €m and % of sales)

<table>
<thead>
<tr>
<th>Region</th>
<th>EBITDA after Capex</th>
<th>Capex</th>
<th>France</th>
<th>1.8%</th>
<th>235</th>
<th>99</th>
<th>1.8%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Other Western Europe</td>
<td>523</td>
<td>154</td>
<td>334</td>
<td>1.7%</td>
<td>235</td>
<td>99</td>
<td>1.7%</td>
</tr>
<tr>
<td>North America</td>
<td>389</td>
<td>75</td>
<td>389</td>
<td>2.7%</td>
<td>314</td>
<td>75</td>
<td>2.7%</td>
</tr>
<tr>
<td>Asia and emerging countries</td>
<td>437</td>
<td>233</td>
<td>437</td>
<td>5.2%</td>
<td>233</td>
<td>75</td>
<td>2.7%</td>
</tr>
</tbody>
</table>
1. HIGHLIGHTS
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2018 OUTLOOK

ECONOMIC CLIMATE

- **France** to continue to enjoy robust momentum in construction markets
- Progression in other Western European countries, despite continued uncertainty in the UK
- Growth in **North America** in both construction markets and industry
- Good momentum in **Asia and emerging countries**

GROUP BUSINESSES

- **Innovative Materials:** continued growth and good margin level
- **Construction Products:** better volumes and prices; focus on the price-cost spread
- **Building Distribution:** should benefit from volume growth in Western Europe
2018 PRIORITIES

- **Focus on sales prices** amid continued inflationary pressure on costs
- **Continuation of the cost cutting program, targeting cost savings of around €300m over the year**, calculated on the 2017 cost base
- **Capital expenditure program of around €1.7bn** (representing around 4% of sales), with a focus on growth capex outside Western Europe and also on productivity (Industry 4.0) and digital transformation
- **Ongoing commitment to invest in R&D** to support our differentiated, high value-added strategy
- **Focus on high free cash flow generation**

Saint-Gobain confirms its objective for full-year 2018 of a like-for-like increase in operating income and for the second half expects the like-for-like increase to be clearly above the level achieved in the first half
1. HIGHLIGHTS
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3 action priorities:

1. *Divestment program*

2. *Targeted, value-creating acquisitions*

3. *Enhanced organizational agility*
AGILE AND VALUE-CREATING PORTFOLIO MANAGEMENT

Divestments: objective of at least €3bn in sales divested by the end of 2019

2013-2017

- €4.8bn in sales divested including Verallia

By the end of 2019

- At least €3bn in sales divested
- Positive impact of around 40bps on the operating margin
- Announcements as and when divestments take place

Focus the Group on a coherent, value-creating portfolio of businesses
2013-2017: 96 acquisitions representing €1.5bn in acquired enterprise value

Since 2013, steady acceleration in strategic acquisitions with very attractive financial terms
**H1 2018: €356m in investments excluding Sika for 13 acquisitions +162% vs H1 2017**

<table>
<thead>
<tr>
<th>Niche technologies</th>
<th>New geographies</th>
<th>Bolt-on acquisitions</th>
</tr>
</thead>
</table>
| Example: Logli Massimo  
*Flat Glass*  
Italy | Example: **KIMMCO**  
*Interior Solutions*  
Kuwait | Example: Per Strand  
*Building Distribution*  
Norway |

- **Product differentiation and rapid capacity for innovation**
- **Entry into a fast-growing market**
- **Local leadership in northern Norway**

**More than €500m in acquisitions on average per year 2018-2020**
REVIEW OF THE GROUP’S ORGANIZATIONAL STRUCTURE: THE NEEDS OF OUR CUSTOMERS AND OUR MARKETS

MULTI-COMFORT & SUSTAINABILITY
for end users (owners, occupiers of commercial premises, drivers)

PRODUCTIVITY
for building industry professionals (contractors, builders)

TAILOR-MADE INNOVATION
for industry
REVIEW OF THE GROUP’S ORGANIZATIONAL STRUCTURE

- **Alignment to the needs of our customers and our markets**: greater priority given to the regional dimension in construction, while maintaining **business synergies**

- **Incorporating digital transformation**

- **Simplifying** decision-making processes and **increasing efficiency and agility**

**Objectives:**

- Presentation of the new organizational structure before the end of the year
- Reduction in central costs

*Increase the organization’s flexibility, agility and proximity to its markets*
CASH ALLOCATION POLICY as mentioned during the 2017 Investor Day

<table>
<thead>
<tr>
<th>Cash allocation 2013 – 2016</th>
<th>2017-2020 TREND</th>
</tr>
</thead>
<tbody>
<tr>
<td>Excluding Verallia</td>
<td></td>
</tr>
<tr>
<td>Cash generated by operations</td>
<td>9.1</td>
</tr>
<tr>
<td>Disposals</td>
<td>0.9</td>
</tr>
<tr>
<td>Capex</td>
<td>-5.0</td>
</tr>
<tr>
<td>Acquisitions</td>
<td>-0.9</td>
</tr>
<tr>
<td>Dividends and share buybacks</td>
<td>-3.9</td>
</tr>
</tbody>
</table>
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 the control of Saint-Gobain, including but not limited to the risks described in Saint-Gobain’s registration document available on its website (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. 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.
COST CUTTING PROGRAM
€290m in cost savings in 2017 (calculated on the 2016 cost base)

Breakdown by Business Sector

~290

~170
Innovative Materials

~110
Construction Products

~10
Building Distribution

Breakdown by type

~290

Purchases

Operational savings
2016-2020 COST CUTTING PROGRAMS

+€290m est.

+€300m est.

+€610m est.
ATTRACTIVE POSITIONING FOCUSED ON RESIDENTIAL CONSTRUCTION AND RENOVATION*

NEW RESIDENTIAL CONSTRUCTION  
21%

NEW NON-RESIDENTIAL CONSTRUCTION  
12%

RENOVATION/INFRASTR.  
50%**

AUTOMOTIVE  
9%

OTHER IND.  
8%

* Saint-Gobain estimated end markets  
** Renovation: 43%  
Infrastructure: 7%
UNIQUE, ATTRACTIVE POSITIONING  
GROWING MARKETS

- Technical solutions for tomorrow's homes

CONSUMPTION PER CAPITA BASED ON WEALTH

- Solutions promising energy efficiency for buildings