


2015  
1665



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In **2015**,

Saint-Gobain is celebrating its **350th anniversary**. Backed by its experience and its ability to continuously innovate, **Saint-Gobain, the world leader in the habitat and construction market**, designs, manufactures and distributes **high-performance** and **building materials**, providing **innovative solutions** to the challenges of growth, energy efficiency and environmental protection. Saint-Gobain focuses on **the long term to create products** and services that make **sustainable construction** and **everyday life easier** for its **customers**.



158 — N° 2117

**LEADER**

L'INDUSTRIE DU VERRE

LES GLACES DE SAINT-GOBAIN

L'ILLUSTRATION

3 DÉCEMBRE 1898



Entrée de la manufacture de Saint-Gobain.

innovation

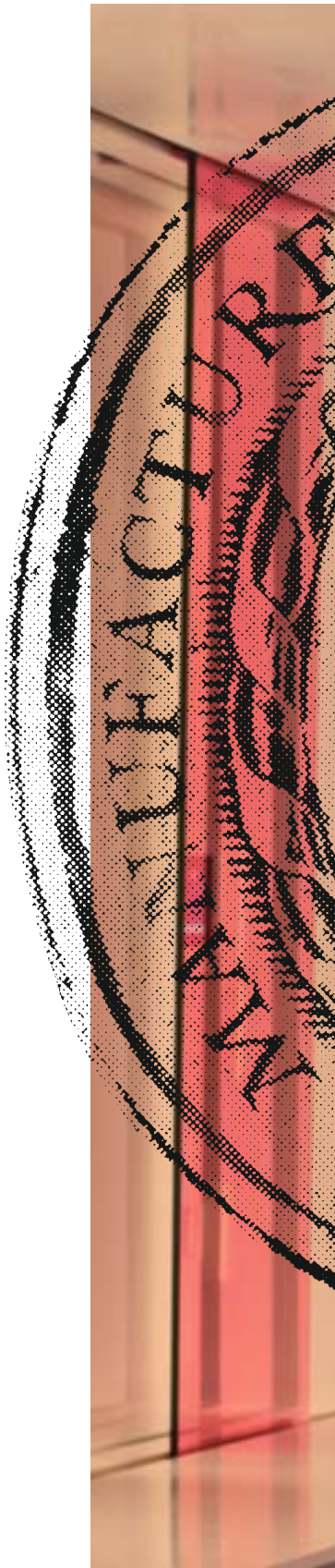
world

esvi

esvi

# Three questions

for Pierre-André  
**DE CHALENDAR**



*What conclusions do you draw from 2014?*

The year 2014 confirmed the improvement in the Group's results despite a difficult macroeconomic environment in France and an uncertain one in Germany. The other geographic regions posted positive growth. Everywhere we have continued our efforts to rationalize costs. This year, the Group has also made significant changes in its portfolio of activities. The Sika takeover plan and the launch of a competitive process to dispose of Verallia were defining points in an accelerated implementation of our strategy.

*What are your main axes of development for 2015?*

These two deals will speed up our changing focus, as we concentrate on the design, production and distribution of innovative and high-performance solutions for housing and industry. They address our goals, ones that we are pursuing beyond these two projects: to increase our growth potential and reduce the capital intensity of our activities, expand our presence in emerging countries and the United States, and broaden our range of differentiated products, supported by strong brands. Being the leader in our businesses is a responsibility we take very seriously. We are the driving force behind the responsible development of our activities, in terms of environmental friendliness, health, personal safety and solidarity with the communities around us. Every day we strive to maintain that balance.

*In 2015 Saint-Gobain celebrates 350 years. What does that mean?*

Saint-Gobain is 350 years old and I am very proud to be at the head of a company with such a heritage. I am one in a long line of leaders who, like me, have made efforts to develop the Group in accordance with the strong values that define it: attention to our employees and partners, a spirit of innovation, and a passion for business, while at the same time continuing to work in solidarity with one another. These 350 years are an opportunity and a promise for the future. It is by continually reinventing itself that Saint-Gobain has evolved through 350 years of history. This experience is a strength: a strength that unites us internally, a strength we place at the service of our customers. Celebrating an anniversary means making plans. Our 350th anniversary confirms our business idea: invent solutions to improve our habitat and daily life. It is the reason why we are celebrating 350 years, as one of many reasons for believing in the future. The year will be full of events and initiatives across the world. Because we wish to share our history with the greatest number of people, we have put an exhibition online that shows the exceptional richness of our heritage: [www.saint-gobain350years.com](http://www.saint-gobain350years.com). In order to demonstrate our expertise and to inspire others, we have created four imaginative pavilions which will be traveling around the world throughout the year. Be sure to visit and admire them (Shanghai in January, Sao Paulo in April, Philadelphia in June and Paris in October).



# 350 years OF HISTORY



17th  
century

## Origins

In 1665, encouraged by his minister Colbert, King Louis XIV of France creates the royal mirror glassworks (*Manufacture royale des glaces*) to challenge Venetian supremacy in mirror manufacturing. The Group's first major achievement was the production of mirrors for the Hall of Mirrors at the Palace of Versailles. Saint-Gobain thus became part of French history.

18th and 19th  
centuries

## *Birth and development of a major company*

In the 18th century, mirrors become fashionable and more affordable. With orders from both royalty and private individuals, the *Manufacture* is modernized, employing over a thousand workers, and sees increasing prosperity over the course of the century. In the 19th century, facing sharp international competition, Saint-Gobain diversifies into the chemical sector. By late in the century, its chemical sector and glass-making activities are of equal importance. Glass manufacturing benefits from the growth of new architectural styles relying heavily on iron and glass, particularly for major public facilities: covered markets, railway stations, covered galleries, etc.



# 21<sup>st</sup> century

## *The leader in sustainable habitat*

Saint-Gobain focuses its strategy on sustainable habitat while continuing to serve a number of industrial markets. Leveraging its many sites around the world, the Group is steadily growing in emerging countries. It is making significant acquisitions to expand its construction materials distribution network in Europe and to supplement its product portfolio (acquisition of British Plaster Board in 2005 - gypsum and plasterboard - and Maxit in 2007 - industrial mortars).



# 20<sup>th</sup> century

## *Construction of the current group*

### FROM GLASS COMPANY TO MULTINATIONAL ENTERPRISE

Saint-Gobain develops interests in all types of glass products (bottles, optical, glass fiber, etc.). The revolution in automobile design and modern architecture, which demands large window surfaces, provide it with new outlets. In 1970 Saint-Gobain merges with the cast iron pipe manufacturing company Pont-à-Mousson, marking the emergence of a new management style, nationalization (1982) followed by privatization (1986), intensified research efforts, growth in new countries and the era of disposals and acquisitions. Among the most notable acquisitions, that of Norton (1990) positioned Saint-Gobain in the high-tech materials sector (abrasives, ceramics, plastics), while Poliet (POINT.P, Lapeyre and Weber) (1996) brought it into the world of construction materials distribution.

*Discover our entire history ....*

BY VISITING THE 350TH ANNIVERSARY EXHIBITION

[www.saint-gobain350years.com](http://www.saint-gobain350years.com)





# WHO ARE WE today?

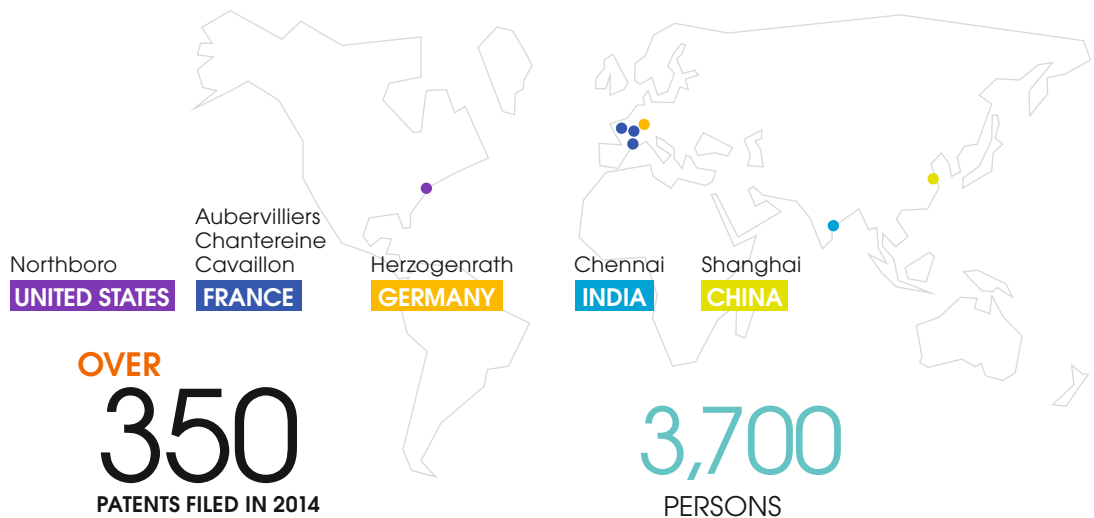
## Industrial facilities



ALGERIA	MEXICO
ARGENTINA	MOROCCO
AUSTRALIA	NETHERLANDS
AUSTRIA	NEW ZEALAND
BELGIUM	NORWAY
BHUTAN	PERU
BRAZIL	POLAND
BULGARIA	PORTUGAL
CANADA	QATAR
CHILE	REPUBLIC OF IRELAND
CHINA	ROMANIA
COLOMBIA	RUSSIA
CZECH REPUBLIC	SAUDI ARABIA
DENMARK	SERBIA
EGYPT	SINGAPORE
ESTONIA	SLOVAKIA
FINLAND	SLOVENIA
FRANCE	SOUTH AFRICA
GERMANY	SOUTH KOREA
GREECE	SPAIN
HUNGARY	SWEDEN
INDIA	SWITZERLAND
INDONESIA	SYRIA
ITALY	THAILAND
JAPAN	TURKEY
JORDAN	UKRAINE
KUWAIT	UNITED ARAB EMIRATES
LATVIA	UNITED KINGDOM
LEBANON	UNITED STATES
LITHUANIA	VENEZUELA
LUXEMBOURG	VIETNAM
MALAYSIA	ZIMBABWE

## R&D

**7**  
CROSS-FUNCTIONAL  
RESEARCH CENTERS





## Products

945 PRODUCTION SITES

1 IN 4  
SAINT-GOBAIN PRODUCTS  
DID NOT EXIST FIVE YEARS AGO

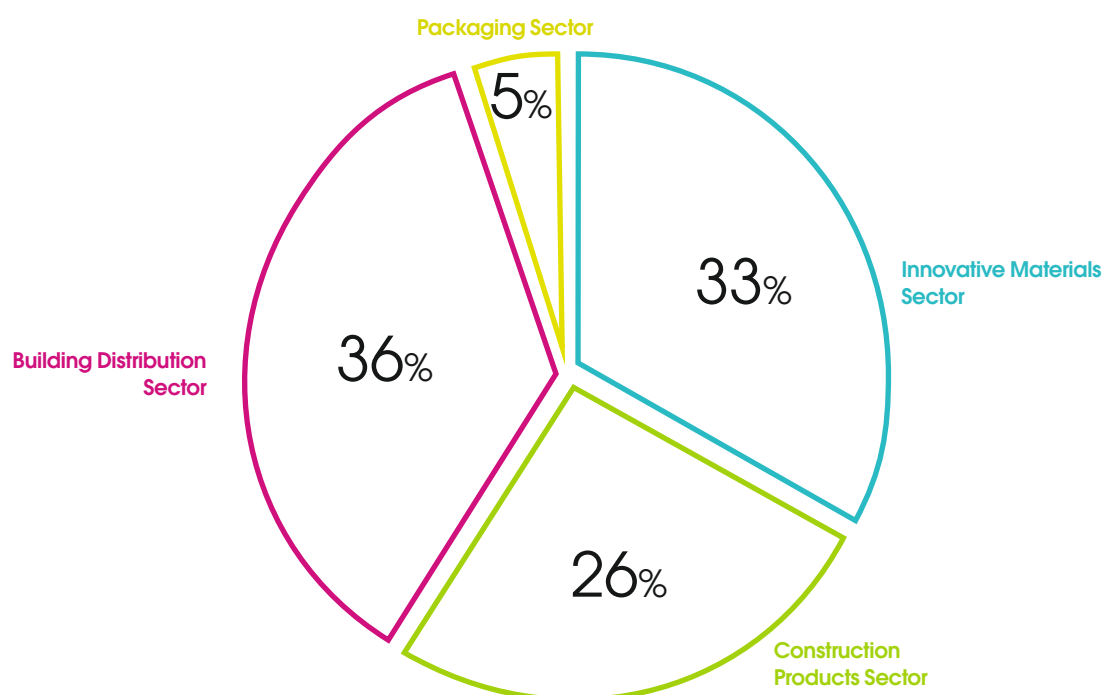
## Human resources

Over 180,000  
EMPLOYEES WORLDWIDE

460,000  
INDIRECT JOBS

3 OUT OF 4 EMPLOYEES  
WORK OUTSIDE FRANCE

— DISTRIBUTION OF WORKFORCE BY BUSINESS —



# Key FIGURES

## 2014 Financial results

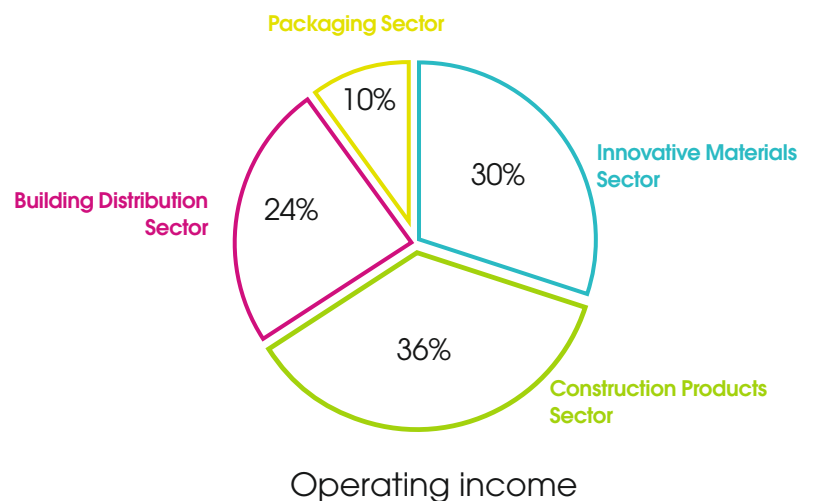
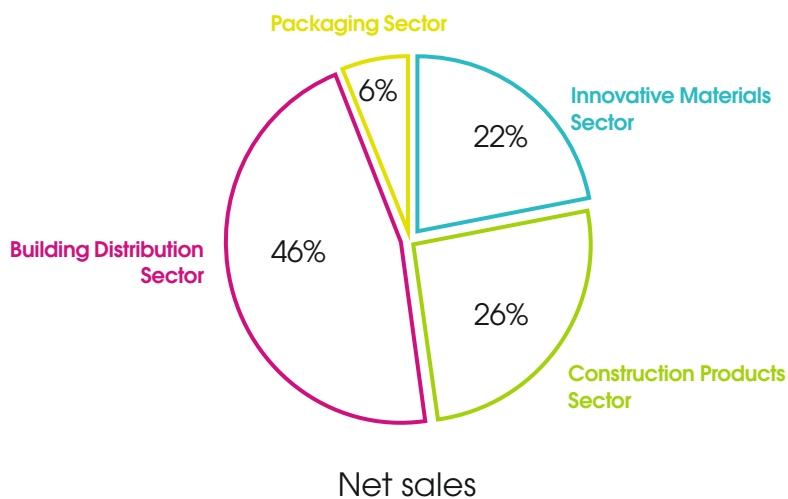
Net Sales

€41.1 billion

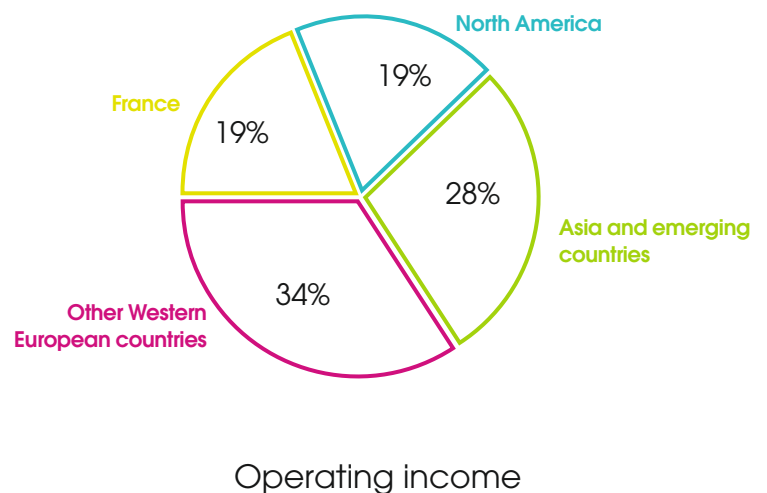
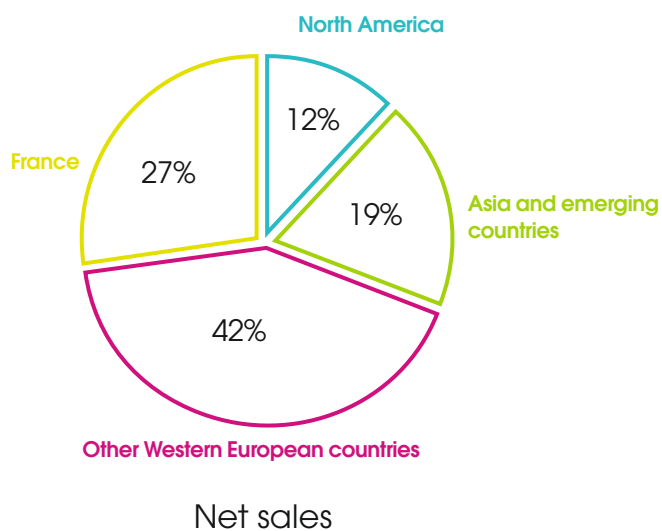
Recurring Net Income

€1.1 billion

### BY SECTOR



### BY GEOGRAPHIC REGION





## Saint-Gobain shares

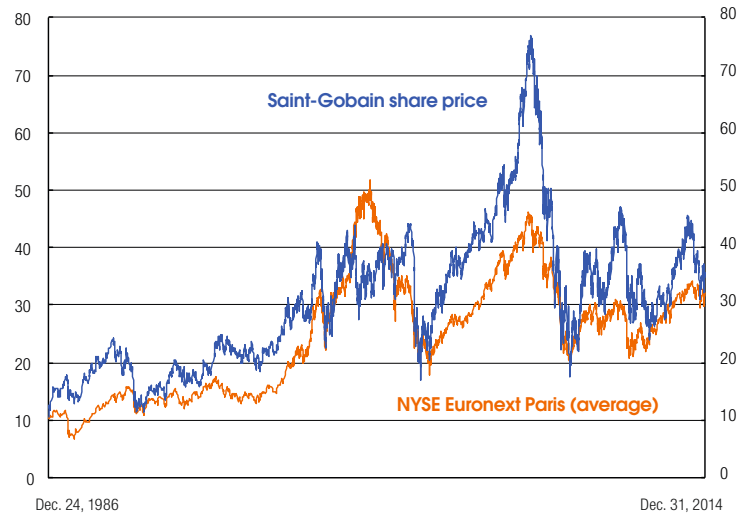
Saint-Gobain's shares are listed on Euronext Paris Compartment A (ISIN code FR 0000 125007), where, as of December 31, 2014, it posted **the 23rd largest stock market capitalization of the CAC 40** (€19,795 million), and **the 18th most active stock on that Exchange**, with an average of 1,986,163 shares traded daily in 2014.

Saint-Gobain shares are also traded on the major European stock exchanges: Frankfurt, London and Zurich (since 1987), Amsterdam and Brussels (since 1988).

Saint-Gobain shares are also on:

- the DJ Euro Stoxx 50 index and the Global Dow, a 150-stock index representing both the traditional and innovative sectors.
- STOXX® Global ESG Leader "Sustainable Development," Euronext Vigeo Europe 120, Euronext Vigeo Eurozone 120, Ethibel ESI Excellence Europe and FTSE4Good indices.

### STOCK PRICE <sup>(1)</sup>

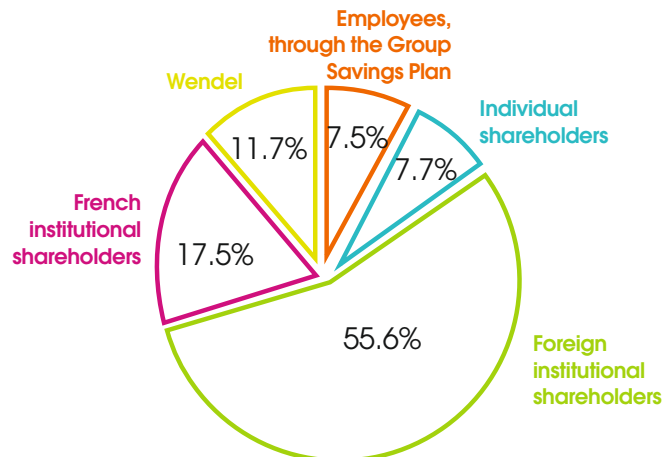


(1) Data adjusted for the impact of the capital increases of March 1994 and February 2009

### TOTAL NUMBER OF SHARES (as at December 31, 2014)

561,895,566

### SHAREHOLDER BASE (as at December 31, 2014)



FOR FURTHER INFORMATION  
[www.saint-gobain.com](http://www.saint-gobain.com)

FINANCIAL COMMUNICATIONS OFFICE:  
[actionnaires@saint-gobain.com](mailto:actionnaires@saint-gobain.com)  
+33 (0)1 47 62 33 33



By downloading the shareholder  
app Saint-Gobain Shareholder

# OUR BUSINESSES

22% of sales



## INNOVATIVE Materials

Combining Flat Glass and High-Performance Materials, the Innovative Materials Sector holds a unique portfolio of materials and processes for the habitat and industrial markets.

### FLAT GLASS No. 1 in Europe No. 2 worldwide

- Active in: 42 countries
- Approximately 32,000 employees

### HIGH-PERFORMANCE MATERIALS No. 1 worldwide

- Active in: 44 countries
- Approximately 27,000 employees

26% of sales



## CONSTRUCTION Products

The Construction Products Sector offers interior and exterior home improvement solutions to enhance the comfort of buildings and homes: plasterboard, acoustic and thermal insulation, siding products, roofing, piping.

### No. 1 worldwide

- > Ductile cast iron pipe
- > Plasterboard and plaster
- > Insulation
- > Tile adhesives

### No. 1 in Europe

- > Siding products

### No. 2 in the United States

- > Siding products

- Active in: 58 countries
- Approximately 47,000 employees



**46%** of sales



## BUILDING Distribution

The contribution of the Building Distribution Sector to the Group is an intimate knowledge of the needs of its customers, whether building professionals, private project owners or large companies. It serves the new construction, renovation and home improvement markets.

### No. 1 in Europe

> Construction materials distribution

- Active in: **27** countries
- Over **63,000** employees
- Nearly **4,400** points of sale

**6%** of sales



## VERALLIA PACKAGING

Under the Verallia brand, the Packaging Sector is a major producer of bottles for the wine and spirits market and jars for food products. Verallia is also active in the markets for beer, fruit juice, non-alcoholic beverages, mineral waters and oils.

### No. 3 worldwide

> Glass bottles and jars

- Active in: **13** countries
- Approximately **10,000** employees

# OUR BRANDS by market

Saint-Gobain maintains the largest portfolio of industrial brand names in the construction sector, with leading brands in its market. The Group is also the European leader in the distribution of construction materials, with independent and highly regarded distribution brands. To serve its industrial markets, Saint-Gobain also holds brands specializing in high-performance materials, which are recognized for their expertise, particularly in the automotive glazing, abrasive, polymer and ceramic markets.

## The Saint-Gobain logo over time



end of 17th-18th  
centuries

Stamp of the Manufacture  
Royale des Glaces.

19th-21st  
centuries



After carrying the royal coat of arms during the Ancien Régime, in the 19th century the *Manufacture des glaces* adopted a motif as a symbol of its activity that was originally developed for its directors' attendance tokens. This was the "lady with the mirror," an image of luxury that highlighted the traditional Saint-Gobain product, mirrors. In the 1960s, the Saint-Gobain corporate name and logo were simplified: the Saint-Gobain name now appears in a black box, but the "lady in the mirror," which has been modernized over time, was retained.



Transformation of  
the "lady with a  
mirror" logo from  
1900 to the 1960s.

A case study is the 1970 merger between Saint-Gobain and Pont-à-Mousson: a common symbol was needed. This was a combination of the Pont-à-Mousson logo, the famous bridge over the Moselle rebuilt after World War II, and the name Saint-Gobain-Pont-à-Mousson, which was kept. In 1981 the decision was made to delete the words "Pont-à-Mousson."



Former Pont-à-Mousson  
logo with the famous bridge  
crossing the Moselle River.



Pont-à-Mousson logo designed  
by Jean Picart Le Doux (1960).



Saint-Gobain-Pont-à-Mousson logo  
after the 1970 merger.

For its 350th anniversary, the Saint-Gobain logo has been supplemented by a number consisting of stylized wires. These wires are representative of time, of the Group's production lines, and the links that unite its teams and its partners.

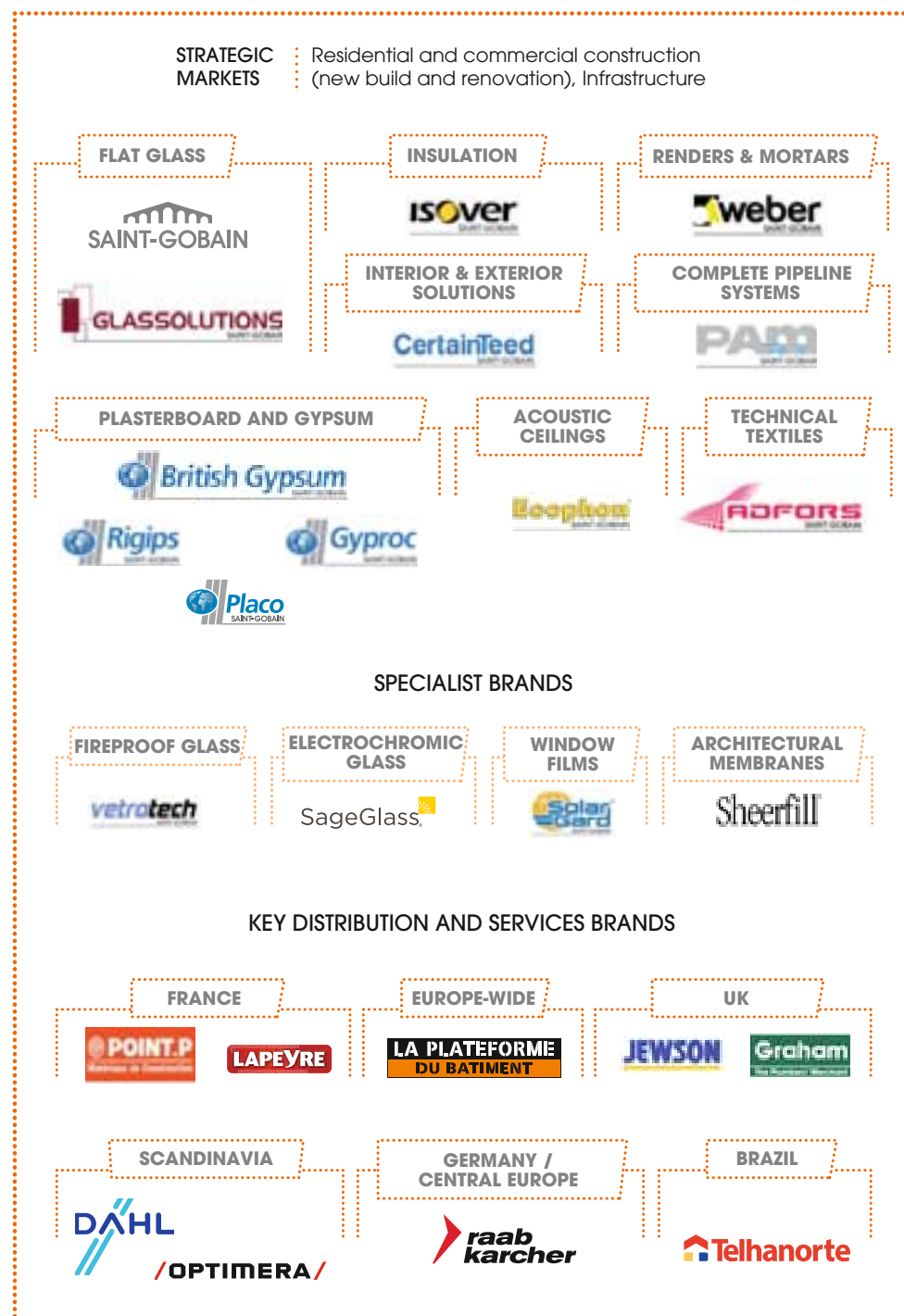




## Our brands today

### CONSTRUCTION

(79% OF SALES)



### INDUSTRY

(21% OF SALES)



# SAINT- GOBAIN

builds  
on the  
past

350 years of history... **350 years** is a reason to believe in **the future...** Saint-Gobain's confidence in tomorrow is the product of its **extraordinary heritage**, which has given it a sense of perspective over the long term, and the **serenity** and flexibility **to adapt itself to the world** and **to changing times**. For the Group, **anticipating** the future means above all **being responsible** for the day-to-day activities of its **teams, customers, partners** and the **territories** in which it is active.





# and plans for the future

2011 E-GLAS heated glass .....  
for a villa in Sweden.



# A strategy

## that anticipates major **GLOBAL CHALLENGES**

Saint-Gobain anticipates and monitors the trends that are reshaping the world, particularly those now transforming the construction markets and distribution channels.

### *Comfortable and energy-efficient housing:* **THE CHALLENGE OF CLIMATE CHANGE**

Concern for climate change and diminishing natural resources are key challenges for the decades to come. Everywhere in the world, countries are implementing policies to improve comfort in housing while reducing housing energy consumption. Thanks to its expertise and the synergies between its various businesses, Saint-Gobain is developing efficient and innovative solutions in both new construction and renovated buildings, in order to effectively address the challenge of improving building energy efficiency and changes in regulatory requirements. Saint-Gobain's Multi-Comfort design combines energy efficiency and comfort in all forms (thermal and acoustic comfort, visual appeal, sanitation, modular comfort and safety).

### *The circular economy:* **THE CHALLENGE OF DIMINISHING RESOURCES**

Consumption of natural resources could triple by 2050. Since this level of consumption is not sustainable, public policies are increasingly adopting a life cycle approach, which takes into account the building in its entirety, from the extraction of raw materials to demolition and recycling. Saint-Gobain promotes a vision of responsible construction and is developing innovative solutions to preserve natural resources.

### The housing sector

**32%**  
**OF ENERGY CONSUMPTION**

**19%**  
**OF GREENHOUSE GAS EMISSIONS**

**FIGURES THAT COULD**

**double  
OR EVEN TRIPLE BY 2050**

Source: 2014: Buildings. In: Climate Change 2014: Mitigation of Climate Change. Contribution of Working Group III to the Fifth Assessment Report of the Intergovernmental Panel on Climate Change

## *An affordable and sustainable habitat:*

### THE CHALLENGE OF POPULATION GROWTH AND URBAN DEVELOPMENT

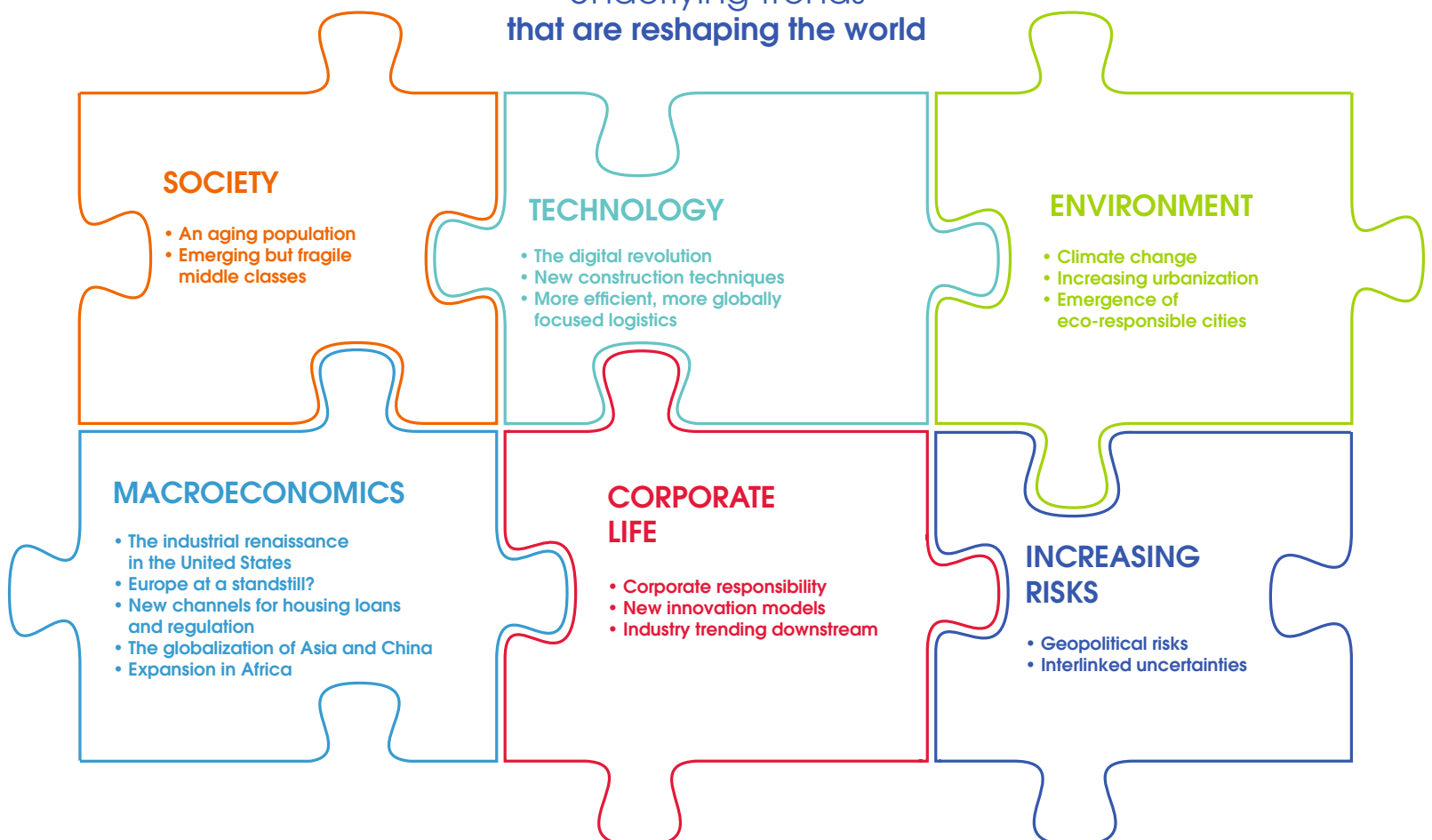
World population is expected to reach 9.6 billion by 2050. This demographic growth is accompanied by increasing urbanization, which will be concentrated on the continents of Asia and Africa, resulting in an increasing need for housing and infrastructure. As a result of its global presence and extensive knowledge of local conditions, the Saint-Gobain Group is well positioned in this high-potential market, offering a range of accessible solutions, adapted to local needs, to address the high demand for affordable and sustainable habitat that improves the quality of urban life.

## *The digital transformation:*

### THE CHALLENGE OF MULTI-CHANNEL INTEGRATION AND THE “DIGITAL ENVIRONMENT”

Digital technology is redefining commercial exchanges at all levels. The digital integration of buildings is leading to technical changes in construction: Building Information Modeling (BIM), and home automation are contributing to the evolution of materials by increasing the demand for more intelligent materials. Since it listens to its customers and is anticipating the restructuring of the Group's markets as a result of new digital tools, Saint-Gobain is implementing a multi-channel digital strategy that enables it to differentiate its offering and ensure visibility for its products and brands.

## Underlying trends that are reshaping the world





SENIOR MANAGEMENT

- 1• Pierre-André de CHALENDAR\***  
*Chairman and Chief Executive Officer of Compagnie de Saint-Gobain*

**2• Benoît BAZIN**  
*Senior Vice President in charge of the Building Distribution Sector*

**3• Jean-Claude BREFFORT**  
*Senior Vice President in charge of International Development*
- 4• John CROWE**  
*Senior Vice President, General Delegate for North America*

**5• Jean-Pierre FLORIS**  
*Senior Vice President in charge of the Packaging Sector and oversight of the Innovative Materials Sector*

**6• Laurent GUILLOT\***  
*Chief Financial Officer*
- 7• Peter HINDLE**  
*Senior Vice President in charge of Sustainable Habitat and General Delegate for the United Kingdom, Republic of Ireland, South Africa, Mozambique, Namibia and Zimbabwe*

**8• Claude IMAUVEN**  
*Senior Vice President in charge of the Construction Products Sector*

\*Members of the Executive Committee

BOARD OF DIRECTORS (at January 1, 2015)

- Pierre-André de CHALENDAR**  
*Chairman and Chief Executive Officer of Compagnie de Saint-Gobain*

**Isabelle BOUILLOT**  
*Chairman of China Equity Links*

**Alain DESTRAIN**  
*Employee Director*

**Jean-Martin FOLZ**  
*Director of companies*

**Bernard GAUTIER**  
*Member of the Management Board of Wendel*
- Anne-Marie IDRAC**  
*Former French Secretary of State for Foreign Trade, Consultant*

**Sylvia JAY**  
*Director of companies*

**Pamela KNAPP**  
*Director of companies*

**Pascal LAÏ**  
*Employee Director*

**Agnès LEMARCHAND**  
*Director of companies*
- Frédéric LEMOINE**  
*Chairman of the Management Board of Wendel*

**Gérard MESTRALLET**  
*Chairman and Chief Executive Officer of GDF Suez*

**Jacques PESTRE**  
*Senior Vice President of SGDB France, Chairman of the Supervisory Board of the Saint-Gobain PEG France corporate mutual fund and Director representing employee shareholders*

**Olivia QIU**  
*Chief Strategy and Innovation Officer of Philips Lighting, Executive Vice President of Philips*
- Denis RANQUE**  
*Chairman of the Board of Directors of Airbus Group*

**Gilles SCHNEPP**  
*Chairman and Chief Executive Officer of Legrand*

**Jean-Dominique SENARD**  
*Chairman of Michelin*

**Philippe VARIN**  
*Chairman of the Board of Directors of Areva*

*Board Secretary:*  
**Antoine VIGNIAL**  
*Corporate Secretary of Compagnie de Saint-Gobain*

Governance

FUNCTIONAL DEPARTMENTS

- Sophie CHEVALLON**  
*Vice President, Communications*
- Fabrice DIDIER**  
*Vice President, Marketing*
- Delphine GENY-STEPHANN**  
*Vice President, Planning and Strategy*
- Didier ROUX**  
*Vice President, Research & Development and Innovation*

SECTOR MANAGEMENT

- Benoît BAZIN**  
*President, Building Distribution Sector*
- Patrick DUPIN**  
*President, Flat Glass Sector (Innovative Materials)*
- Jean-Pierre FLORIS**  
*President, Packaging Sector*
- Benoît d'IRIBARNE**  
*President, High-Performance Materials Sector (Innovative Materials)*
- Claude IMAUVEN**  
*President, Construction Products Sector*

GENERAL DELEGATES

- Dominique AZAM**  
*General Delegate for Mexico, Central America, Venezuela, Colombia, Ecuador and Peru*
- John CROWE**  
*General Delegate for North America*
- Hartmut FISCHER**  
*General Delegate for Central Europe*
- Javier GIMENO**  
*General Delegate for the Asia-Pacific Region*
- Peter HINDLE**  
*General Delegate for the United Kingdom, Republic of Ireland, South Africa, Mozambique, Namibia and Zimbabwe*
- Thierry FOURNIER**  
*General Delegate for Brazil, Argentina and Chile*
- Thierry LAMBERT**  
*General Delegate for the Nordic Countries and Baltic States*
- Anand MAHAJAN**  
*General Delegate for India, Sri Lanka and Bangladesh*
- François-Xavier MOSER**  
*General Delegate for Poland, Bulgaria and Romania*
- Gonzague de PIREY**  
*General Delegate for Russia, Ukraine and the CIS*
- Ricardo de RAMÓN GARCIA**  
*General Delegate for Spain, Portugal, Morocco, Algeria and Tunisia*
- Tomás ROSÁK**  
*General Delegate for the Czech Republic, Slovakia, Hungary and the Eastern Adriatic countries*
- Gianni SCOTTI**  
*General Delegate for Italy, Greece, Egypt, Turkey and Libya*



# FIVE AREAS

## of corporate social responsibility policy

### AREA 1

Saint-Gobain offers solutions to meet the challenges of sustainable construction. To become the reference in sustainable habitat, Saint-Gobain is developing innovative solutions dedicated to construction and renovation, combining energy saving, comfort, the health of occupants and aesthetics, while conserving natural resources.

## *Inventing sustainable buildings*

## *Standing out in industry markets*

Saint-Gobain's industrial activities are developing solutions which affect the entire life cycle of their products and those of their customers, with a threefold ambition: economic, social and environmental performance.

### AREA 2



.... *learn about our commitments*  
at [www.saint-gobain.com](http://www.saint-gobain.com)

SAINT-GOBAIN BUILDS ON THE PAST AND PLANS FOR THE FUTURE

### AREA 3



## *Limiting* the Group's environmental impacts

Saint-Gobain takes care to ensure the sustainable development of its businesses, while protecting the environment from the impacts of its processes and services throughout their entire life cycle. The Group seeks to guarantee the conservation and availability of natural resources, to address the expectations of its stakeholders on these issues, and offer greater added value to its customers for a minimal environmental impact.

### AREA 5

Wherever it is present, the Saint-Gobain Group ensures that value creation is shared. Long-term local development is integrated into the Group's initiatives, and it combines its presence with respect for local communities, in a context of ongoing dialog with public authorities and with all stakeholders.

## *Supporting* local community development and taking action across the value chain

### AREA 4



## *Encouraging* employees professional growth

Saint-Gobain makes every effort to strengthen the commitment and satisfaction of its employees. Management example, social dialog, respect for individuals and employee health and safety are the fundamentals on which these measures are based.





# KEY

# achievements

2014 France....  
Glass floor on the 1st level of  
the Eiffel Tower, Paris.

Since its foundation as the *Manufacture royale des glaces* in 1665, Saint-Gobain has been a participant in architectural revolutions. Its products can be found in a number of prestigious and pioneering achievements, from the Hall of Mirrors at the Palace of Versailles to the glass floor at the Eiffel Tower, not forgetting the Statue of Liberty.





.... 2011 Russia  
Acoustic panels, glass wool insulation and mortar during restoration of the Bolshoi Theater, Moscow.



... 1989 France  
Glass in the Louvre Pyramid, Paris.



2013 United States  
Fire-resistant glass at the Statue of Liberty, New York.



1983 France ....  
Mortars for Lascaux 2.







.... 2010 United Kingdom  
*Plaster products for the staircase of  
the Aviator Hotel, Farnborough.*



1931 Italy ....  
Conduits for the gas pipeline  
workshop, Florence.



2009 Finland  
Heated glass for the Kakslauttanen  
Hotel, Saariselkä.



.... 2014 United Kingdom  
Glass floor of the Tower Bridge  
walkway, London.





.... 2008 United States  
Glass at the TKTS stand,  
New York.



2006 China  
Insulation and glazing at the National  
Center for Performing Arts, Beijing.




1998 Malaysia  
Fireproof plasterboard in  
the Petronas Towers, Kuala Lumpur.



1970 Brazil  
The roof glazing of Brasilia Cathedral.





# The WOR LD has no boundaries

For 350 years, Saint-Gobain has been a witness and a participant in a world without limits. **Since its first establishment abroad in Germany in the 1850s**, it has not ceased its international growth in order to provide **customized solutions** to local markets. The Group believes in every country's potential, and **seeks to meet both** the **demands of mature** countries and the **exponential requirements of countries experiencing rapid growth**.

With manufacturing activities in **64 countries today**, Saint-Gobain continues its process of **self-enrichment** through every **culture in the territories** in which it is present.





UUND CHEMISCHEN FABRI  
EIGNIEDERLASSUNG STOLE

ACTIEN-GESELLSCHAFT DER SPIEG  
ST.GOBAIN, CHAUN

2012 The Hyatt Capital Gate .....  
Hotel in Abu Dhabi was built with  
Saint-Gobain Gyproc plasterboard.

A truly  
global  
GROUP

Essentially a European company until the 1950s, Saint-Gobain then embarked on its conquest of other continents through a number of new facilities and acquisitions. From the 1980s until today, the Group has seen its industrial presence grow from 18 to 64 countries.

1665 1905

- 1665 France
- 1858 Germany
- 1889 Italy
- 1898 Belgium
- 1904 Netherlands
- 1905 Spain

1905 1990

- 1938 Argentina
- 1958 United States
- 1960 Brazil
- 1962 Portugal
- 1970 Mexico
- 1974 Japan
- 1985 United Kingdom

1990 2014

- 1990 Australia
- 1990 China
- 1991 South Korea
- 1992 Poland
- 1992 Czech Republic
- 1996 India
- 1996 South Africa
- 1998 Turkey
- 2002 Russia
- 2006 Egypt
- 2011 Algeria

1858

Germany

AFTER MERGING WITH THE GLASS MANUFACTURER SAINT-QUIRIN, Saint-Gobain acquired the Mannheim-Waldhof glassworks, founded in 1853.

1958

United States

CREATION OF AMERICAN SAINT-GOBAIN (FLAT GLASS). Creation in 1967 of a joint venture with CertainTeed (insulation). Acquisition of CertainTeed in 1976. Saint-Gobain has maintained a glass storage facility in New York since 1830.

1960

Brazil

ACQUISITION OF SANTA MARINA (Flat Glass and Packaging). Pont-à-Mousson, which merged with Saint-Gobain in 1970, has been operating in Brazil since 1937.

2009

Middle East

ACQUISITION OF SODAMCO (MORTARS) Saudi Arabia, United Arab Emirates, Jordan, Kuwait, Lebanon, Qatar and Syria.

1990

China

CREATION OF ZHONGPU ELECTRO REFRACTORIES (ZPER), a joint venture with a Chinese partner and SEPR, a Saint-Gobain subsidiary specializing in refractories (High-Performance Materials). Saint-Gobain opened a commercial office in China in 1985.

1996

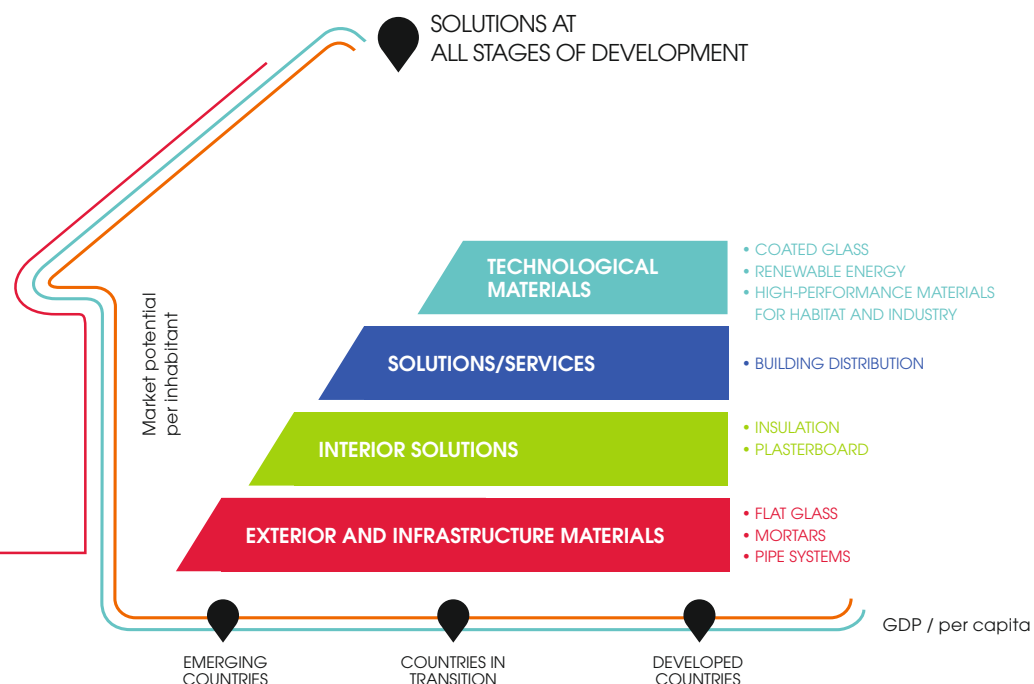
India

ACQUISITION OF GRINDWELL NORTON (High-Performance Materials: abrasives and refractories).



# Global PRESENCE, local responses

Saint-Gobain is a multi-regional player that serves local markets. The Group offers solutions that reflect various stages of economic development and regional climatic constraints. It achieves this by relying on its major R&D centers and on approximately one hundred development units around the world. These allow it to develop new products to respond better to the specific needs of customers and local market requirements.



## South Africa

### ENHANCING TRADITIONAL MATERIALS

Saint-Gobain Gyproc designed Stand 47, a high-end house located at Monahan Farm. It uses traditional South African materials in a strongly contemporary architectural style, adapted to local characteristics.



[www.stand47.co.za](http://www.stand47.co.za)





## Brazil and Qatar

### WATER SUPPLY

Saint-Gobain ensures water supply for cities, particularly in fast-growing countries where urban development is accelerating. Saint-Gobain PAM has entered into major contracts, including ones for 400 kilometers of pipelines in Brazil and 95 kilometers in Qatar.



## China

### INSPIRED BY LOCAL MATERIALS

Saint-Gobain Pam China sells PAMboo, ductile iron piping for carrying drinking water. This product reproduces the benefits of bamboo, a natural material that is solid, flexible and traditionally used to carry water.



## France

### A TREND-SETTER

K PAR K has unveiled its latest collection of doors designed by the designer Bina Bartei.

## Belgium

### INSULATING THE ECO-QUARTERS

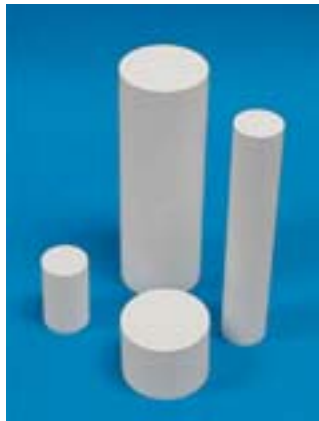
ISOVER and Saint-Gobain Gyproc have provided solutions for the Balk van Beel building located in the futuristic Tweewaters eco-district of Louvain.



# SAINT-GOBAIN believes

in every country's potential

Although Europe remains its largest global market, Saint-Gobain's development strategy is intended to ensure that the Group maintains a global geographic presence. Saint-Gobain is therefore increasing the share of its investments outside Western Europe in order to capture potential growth.



## *United States*

SAINT-GOBAIN HAS ACQUIRED TWO NEW CERAMIC MATERIALS PRODUCTION COMPANIES,

Phoenix Coating Resources and Z-Tech. They serve the aerospace market and are fully consistent with the Group's strategy of strengthening its positioning in high-performance solutions in growing markets.



## *Mexico*

THE SAINT-GOBAIN SEKURIT MEXICO PLANT IN CUAUTLA

has doubled its capacity in four years, achieving annual production of 2.4 million complete auto glass sets (car sets), so as to participate in the fast-growing American market.



## Norway

### THE DISTRIBUTION BRAND OPTIMERA

has opened a new 6,100 m<sup>2</sup> logistics platform at Sandmoen. It is one of the country's largest buildings dedicated to the distribution of construction materials.



## India

### SAINT-GOBAIN GLASS

has inaugurated its fourth float in the country. It manufactures 300,000 metric tons of clear, tinted and solar glass each year, largely intended for the Indian construction and automotive markets.



## Sub-Saharan Africa

### SAINT-GOBAIN HAS OPENED TWO MULTI-ACTIVITY COMMERCIAL OFFICES, IN GHANA AND KENYA.

These will enable the Group to accelerate its commercial growth in West and East Africa.



## Brazil

### SAINT-GOBAIN HAS OPENED ITS SEVENTEENTH AND EIGHTEENTH WEBER MORTAR PLANTS IN THE COUNTRY.

A Placo plasterboard production site was also opened at Feira de Santana, in the State of Bahia.



# Sustainable

# HABITAT

For 350 years Saint-Gobain has anticipated the future. Today, **its sustainable habitat strategy** is responding to the challenges of **energy transition** and **environmental conservation**. As a global leader in housing, **Saint-Gobain mobilizes the expertise** of its companies to offer a range of solutions for buildings that are **more energy-efficient** but also **more comfortable** for daily living.

To meet the needs of sustainable construction, Saint-Gobain offers materials and solutions, and promotes its vision of housing **through its efforts to influence sustainable construction and educate its customers.**



2007 Saint-Gobain .....  
refocuses its strategy  
on housing.

is within  
reach

# HOUSING

## from 1665 to 2065



Relive the history of  
our housing innovations  
BY VISITING THE 350TH ANNIVERSARY EXHIBITION  
[www.saint-gobain350years.com](http://www.saint-gobain350years.com)



CLASSICAL BUILDING  
End 18th century



PARISIAN BUILDING  
End 19th century



VILLA  
1920-1930



MODERN BUILDING  
1950-1960



SINGLE-FAMILY HOUSE  
1970-1980



MULTI-COMFORT HOUSE  
2015

TOMORROW'S HOUSE  
In 2065



Since 1665, the technologies developed by the Group and its subsidiaries have facilitated over three centuries of technical progress and architectural revolution.

At the end of the 18th century, the mirrors of the *Manufacture royale* decorated and brought light to the interiors of buildings now divided into separate apartments.

At the end of the 19th century, Pont-à-Mousson pipes supplied water and gas to homes. In the same period, merchants such as Brossette, Jewson and Dahl helped with the introduction and spread of new materials used in construction (metals, cement, and the first industrial mortars).

During the inter-war period, avant-garde architects started to use glass more widely, making it a building material in its own right. Its use became increasingly diversified into mirrors, glazing, bricks and slabs, insulators for electricity, decorative glass and furniture made of tempered glass.

Following the Second World War, Saint-Gobain standardized its materials to address the needs of the era of reconstruction that followed the war. Prefabrication allowed for faster and more economical building. New materials appeared, such as plastics, glass wool and plasterboard.

In the 1970s, after the oil crises, there was a greater focus on reducing the energy consumed in housing: ISOVER glass wool became increasingly widely used for thermal and acoustic insulation.

In a number of countries, new buildings will soon have to be positive-energy, which means they will have to generate more energy than they consume. Saint-Gobain has already factored this requirement in by combining all its products in its "Multi-Comfort" projects, which are both attractive and environmentally-friendly and ensure the comfort of their occupants.

In 2065, Saint-Gobain imagines a connected habitat that will operate autonomously and recognize its occupants. Weber mortars will change color depending on the weather. SageGlass® variable-tint active glass will adapt to natural lighting and display information. Mobile partitions will reconfigure rooms and broadcast music, among other developments.



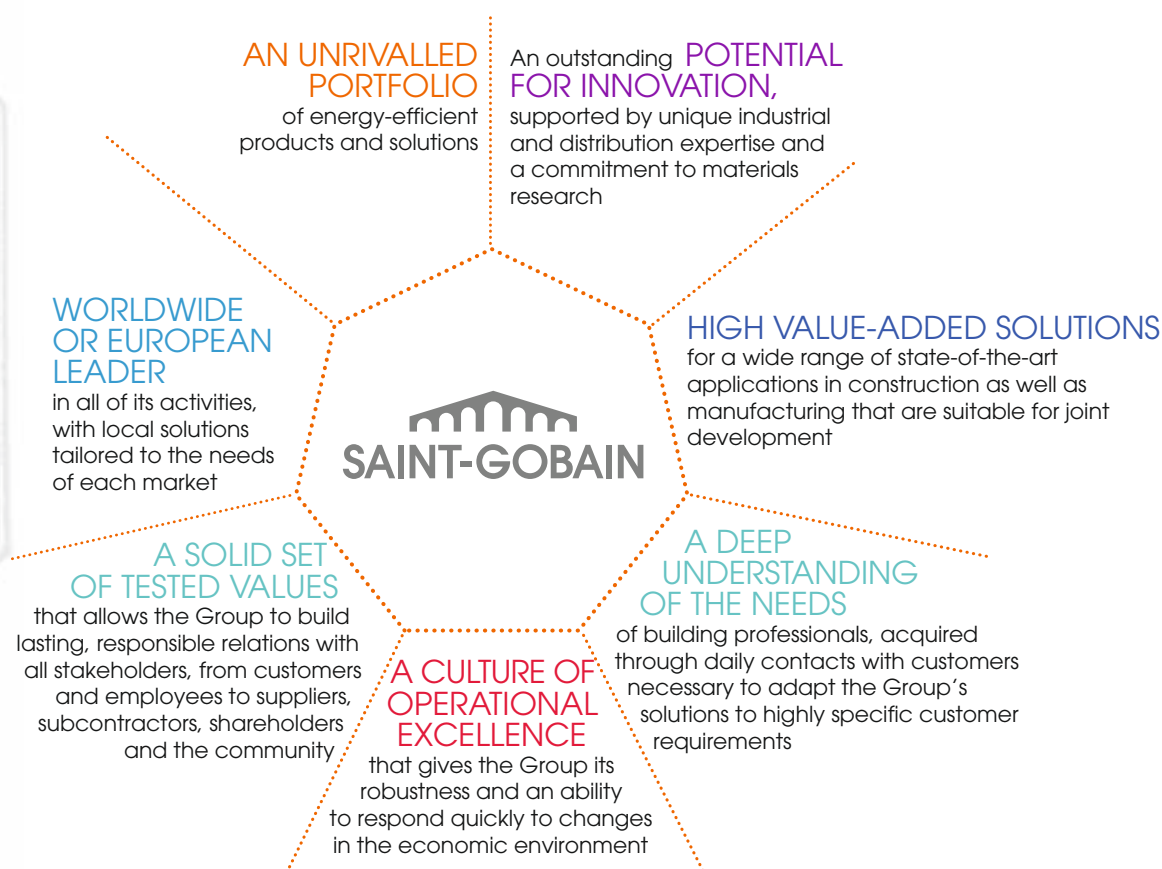
# The reference **FOR SUSTAINABLE** habitat

Saint-Gobain has made the strategic decision to become the reference in sustainable habitat, in both the residential construction market and the non-residential and office construction markets. Saint-Gobain is also positioned in fast-growing industrial markets and certain consumer markets. Its goal? To improve our habitat and daily life.

Approximately  
**80%**

**OF THE GROUP'S SALES**

*are aimed at the housing markets.*

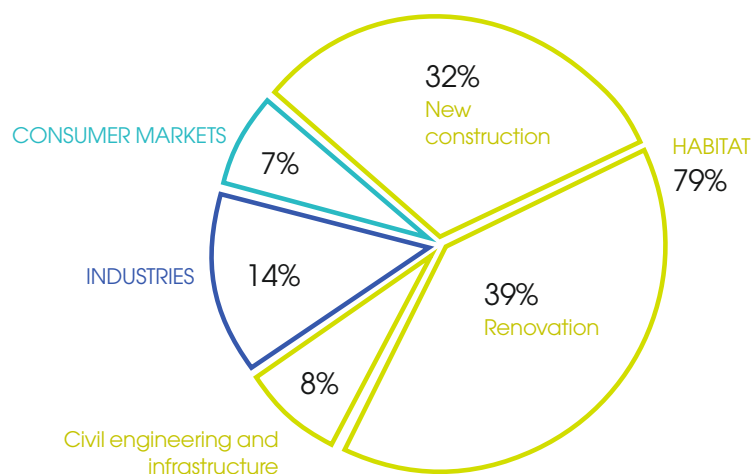


## Unique positioning to address changes in construction markets

In Saint-Gobain's view, a sustainable building must, above all, be "Multi-Comfort": it must meet not only energy savings requirements but, even more importantly, it must serve the needs of the users living in it. Saint-Gobain is an active ambassador for sustainable construction and is

committed to more closely addressing stakeholder expectations and participating in the creation of building regulations. Cross-functional Housing organizations, present in 38 countries, ensure linkage and coordination between the various Saint-Gobain brands, with the goal of

developing a common and cross-functional product offering centered on housing. The Group's retail brand network ensures a close relationship with customers, which is indispensable in order to anticipate their expectations. Among other factors, this is a result of increased training in sustainable construction techniques and in the Group's solutions.



— THE GROUP'S HOUSING MARKETS —  
(distribution of sales by market)

Thanks to its varied portfolio of solutions and the synergies between its activities, Saint-Gobain is able to tailor its offerings to new construction techniques, particularly in the field of Building Information Modeling (BIM). The Internet has also profoundly revitalized the Group's relationship with its customers. All the activities have rolled out digital strategies to distinguish their products and ensure brand visibility. In Distribution, Saint-Gobain is adopting a multi-channel approach to develop e-commerce services, supported by state-of-the-art logistics.

## High-performance for high-tech markets

**The Group has positioned itself in a unique way:** with complementary strategies in construction material and high-performance technologies. The Innovative Materials Sector designs high value-added solutions for a wide range of high-tech applications in both construction and manufacturing. It provides advanced expertise in a number of technologies, allowing the

Group to take better advantage of the synergy between three families of materials (ceramic materials, high-performance polymers and glass fiber yarn). Through its innovation potential, its network of application engineers and its expertise in materials transformation processes, Saint-Gobain offers solutions specifically tailored to the dynamic automotive,

aerospace, health and energy markets, developed in close collaboration with its customers. The combination of joint development, research and innovation is an important lever in growth of the Group's sales and profits and in Saint-Gobain's strategy aimed at standing out in these markets.



# Our businesses in the service OF HOUSING

Saint-Gobain designs and develops innovative solutions to improve the quality of living space and reduce the environmental impact of buildings. These solutions range from exterior building facings to interior layouts. Saint-Gobain's distribution activity acts as a driver of its sustainable habitat strategy through the detailed knowledge it provides of customer needs.

## *A unique portfolio of construction products and solutions*

- **In Flat Glass, Saint-Gobain Glass** manufactures flat glass (float) for the building industries. This glass may be clear, printed, laminated, coated or colored. **Glassolutions** is a network of transformation and distribution companies covering a vast array of applications for the building market: facings, major architectural projects, urban facilities, industrial worksites, furniture, bathroom fixtures, and interior decorating glass.
- **The Gypsum Activity** extracts and processes gypsum into a wide array of plaster products for construction and decorating: partitions and facings for walls, ceilings and floors.
- **The Insulation Activity** offers solutions based on mineral wool and polystyrene foam and polyurethane, mainly aimed at external building insulation (roofs, walls, floors). Other needs are also addressed, such as heating and air conditioning system insulation.
- **The Exterior Products Activity** offers a complete range of products specific to North American homes, including siding, shingles and exterior panel solutions.
- **The Industrial Mortars Activity** offers a comprehensive range of exterior wall decoration, protection and insulation solutions, as well as tiling and floor products.
- **High-Performance Materials** provides solutions for a range of construction applications. **Abrasives** are used for the cutting of concrete walls and floors, the sanding of wooden floors, and polishing for decorative finishes. The films, foams and coated fabrics of **Performance Plastics** are also used in construction. Meanwhile, **Saint-Gobain Adfors** manufactures glass fiber mesh for exterior insulation systems, wall coverings, joint tapes, bonded glass fiber for thermal insulation, and mosquito netting.
- Finally, **the Pipes Activity** offers complete solutions for the water supply market: ductile iron pipe systems, municipal castings and wastewater and rainwater drainage systems for buildings.

## Distribution, a driver of the Group's strategy

Saint-Gobain's ambition to become the reference for sustainable habitat is based on its business activity. Distribution is a driver of the Group's strategy, affording it detailed knowledge of its customers' needs.

Saint-Gobain has developed **a network of strong and complementary brands**, both generalist and specialist, oriented towards trade customers, private contractors and small, medium and large companies. Anchored in its own local market, each brand has developed a positioning that addresses the specific needs of each type of customer and market.

To assist and guide customers as their businesses develop, Saint-Gobain's brands are developing **tools and training programs**: free information seminars on new standards and regulations, and e-learning to provide rapid follow-up to the knowledge they acquire of energy-efficient renovations. **Customer satisfaction** is a top priority of its brands. Certain brands have rolled out tools at their sales outlets to allow customers to comment on their visits and assess certain criteria such as clarity of information, quality of advice, prices and services.

Saint-Gobain's **digital strategy** for its brands is ambitious, and is based around three axes. The first is profiling, which consists of sending tailored product and service information to all customers visiting brand websites. The second is to offer numerous services, both online and via smartphones: product supply and availability, customized fees, 24/7 online ordering, online accounts, advice and tools. The third is a "multi-channel" offering. A customer may thus access the offering not only through a brand's e-commerce site but also via physical sales outlets, call centers, social media, printed and virtual catalogs, etc.



### Finland

**Multi-Comfort house** opened in Finland in 2013 and using materials from seven Group subsidiaries: ISOVER, Saint-Gobain Gyproc, Weber, Ecophon, Saint-Gobain PAM, Saint-Gobain Glass and Dahl.

### France

**100 POINT.P Matériaux de Construction agencies** are labeled Energy Efficiency Expert. Their specialized offerings include an energy efficiency simulator for construction projects, as well as relationships with a partner Thermal Studies Office.



### United Kingdom

**Jewson has trained** over 600 of its sales representatives in order to strengthen their expertise in the wood sector and thus better serve their professional customers.





# COMFORT, an ongoing concern

A “Multi-Comfort” building meets the requirements of energy saving, but is especially adapted to the users occupying it: energy efficiency, air quality, lighting and sound control, etc. These have long been concerns of Saint-Gobain, which means it pays close attention to comfort when implementing its products.

## 1959

**France** – Advertisement for the installation of Lapeyre kitchen furnishings. Standardized materials make it easier for DIY enthusiasts to complete projects, such as creating their own kitchens. Lapeyre developed this type of products in the 1950s.



## 1960

**France** – Advertisement for CLARIT doors. This tempered glass door supplied with SEVA hinges was one of Saint-Gobain’s key interior solutions products in the 1960s. The CLARIT door, which is still marketed today by Glassolutions, allows light to pass through, thus creating a more pleasant environment.



## 1961

**France** – Advertisement for Saint-Gobain glass at Orly. Inaugurated in 1961, Orly-Sud Airport was held up as an architectural success from the very beginning. At the time, thick mirror glass ensured acoustical comfort.

Today, double or triple glazing incorporating an acoustical film perform this function.



## 1972

**United States** – CertainTeed advertising campaign. Miss America 1956, Sharon Kay Ritchie, praises the merits of CertainTeed glass wool, a material that reduces energy use in houses, which became more widespread in the 1970s following the oil crises.





...See Saint-Gobain advertisements throughout the ages

AT THE 350TH ANNIVERSARY EXHIBITION

[www.saint-gobain350years.com](http://www.saint-gobain350years.com)

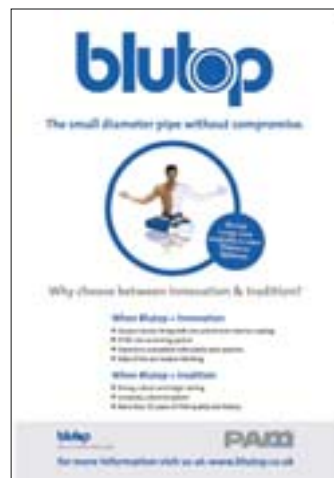
## 1987

**France** – POINT.P campaign. In 1987, POINT.P launched a major advertising campaign with the slogan "made for builders." According to POINT.P, its business is synonymous with choice, product quality, advice and service. True customer convenience!



## 2013

**United Kingdom** – Saint-Gobain PAM advertisement. The BLUTOP® product line is associated with drinking water distribution networks in urban, semi-urban and rural areas. Its lightweight pipes can be carried by hand at construction sites for ease of installation.



## 1978

**Japan** – Isover advertisement. All the properties of glass wool are displayed here. Thermal and acoustical insulation, as well as fire resistance, lightness and easy handling and cutting!



## 2013

**Denmark** – Dahl advertisement. The Dahl Denmark website is based on a mobile application. In the digital era, to simplify its customers' lives, Saint-Gobain's sales have become multi-channel...



## 2009

**France** – Placo advertisement. Lutèce Air'Pur® plaster is a Placo® innovation that reduces the concentration of certain volatile organic compounds in the air. It also offers better air quality in building interiors.



## 2010

**Germany** – Advertisement for Raab Karcher. The house is one of Saint-Gobain's emblems, associated with its sustainable habitat strategy. It is this symbol that the general distribution brand uses to explain to its customers that it has every product they need.



## 2011

**United Kingdom** – Weber advertisement. weber.floor floor facings have a formula that reduces dust emissions for simplified installation with less effort and faster cleaning time.



# SUSTAINABLE

## habitat for all

Saint-Gobain is committed to a sustainable habitat for all, whether by developing solutions or partnerships to make housing accessible to the greatest number of people, or through the Saint-Gobain Initiatives Foundation.

### *Making housing affordable for the greatest number of people*

Renovation is essential for combating energy shortages. Saint-Gobain offers affordable solutions and training for professionals in all measures that reduce energy consumption in housing: insulation, replacing windows, etc.

Living space modularity and affordability contribute moreover to "Multi-Comfort:" to address the challenges faced by senior citizens and to make housing more affordable for all generations, Saint-Gobain is developing

customized products. The Group's solutions enable housing to be built that adapts to its occupants' life cycles (lifestyles, mobility) for greater comfort. Comfort becomes multi-generational. Although reinforced partitions foster the construction of access ramps, they can also support heavy furniture. While an Italian-style shower facilitates movement, it also guarantees more efficient cleaning, etc.



United Kingdom

To address the increased demand for housing in the United Kingdom, Saint-Gobain and the University of Nottingham have developed a new housing concept: the Nottingham H.O.U.S.E. (Home Optimising the Use of Solar Energy). This house combines low energy consumption with an affordable price.



France

Lapeyre has created the first "Affordable Housing Guide," combining multiple solutions, advice, services and hints on how to improve independence, wellbeing, safety and accessibility in each room of a house. This approach is supplemented by the "Concept'care by Lapeyre®," beautiful, practical and safe bathroom fixtures for every age.



France

Since 2013, Saint-Gobain has partnered with the Phoenix-Senior Association to develop an inter-generational and evolving housing concept. An extension of the Multi-Comfort concept, "Multi-Comfort Serenity," presents a specific response to the challenges of aging by guaranteeing maximum autonomy for seniors. Saint-Gobain is participating in the construction of a "Multi-Comfort Serenity" building near Angers.

## The Saint-Gobain Initiatives International Enterprise Foundation

The Saint-Gobain Initiatives International Enterprise Foundation is based on employee commitment. All Group employees – whether working or retired – may sponsor solidarity measures in three areas related to Saint-Gobain's strategy:

- integration of young adults into professional life;
- construction, improvement or renovation of public housing for purposes related to the public interest;
- reducing energy consumption and conserving the environment in the area of public housing.

The projects must be headed by a non-profit agency and located near a Group site.

The Foundation provides financial support for the projects it selects. In addition, Saint-Gobain subsidiaries may provide support in technical skills or provide donations of equipment and materials. Certain projects offer opportunities to mobilize local employees, who commit themselves through the sponsoring association and participate on a volunteer basis.



**95** PROJECTS supported 2008-2014

**€6.6** MILLION committed 2008-2014

### ..... France

The Foundation participated in building a home for the ESAT of the Moulin Vert Association at Arzon, Brittany. The facility assists 50 mentally disabled individuals.



### ..... Russia

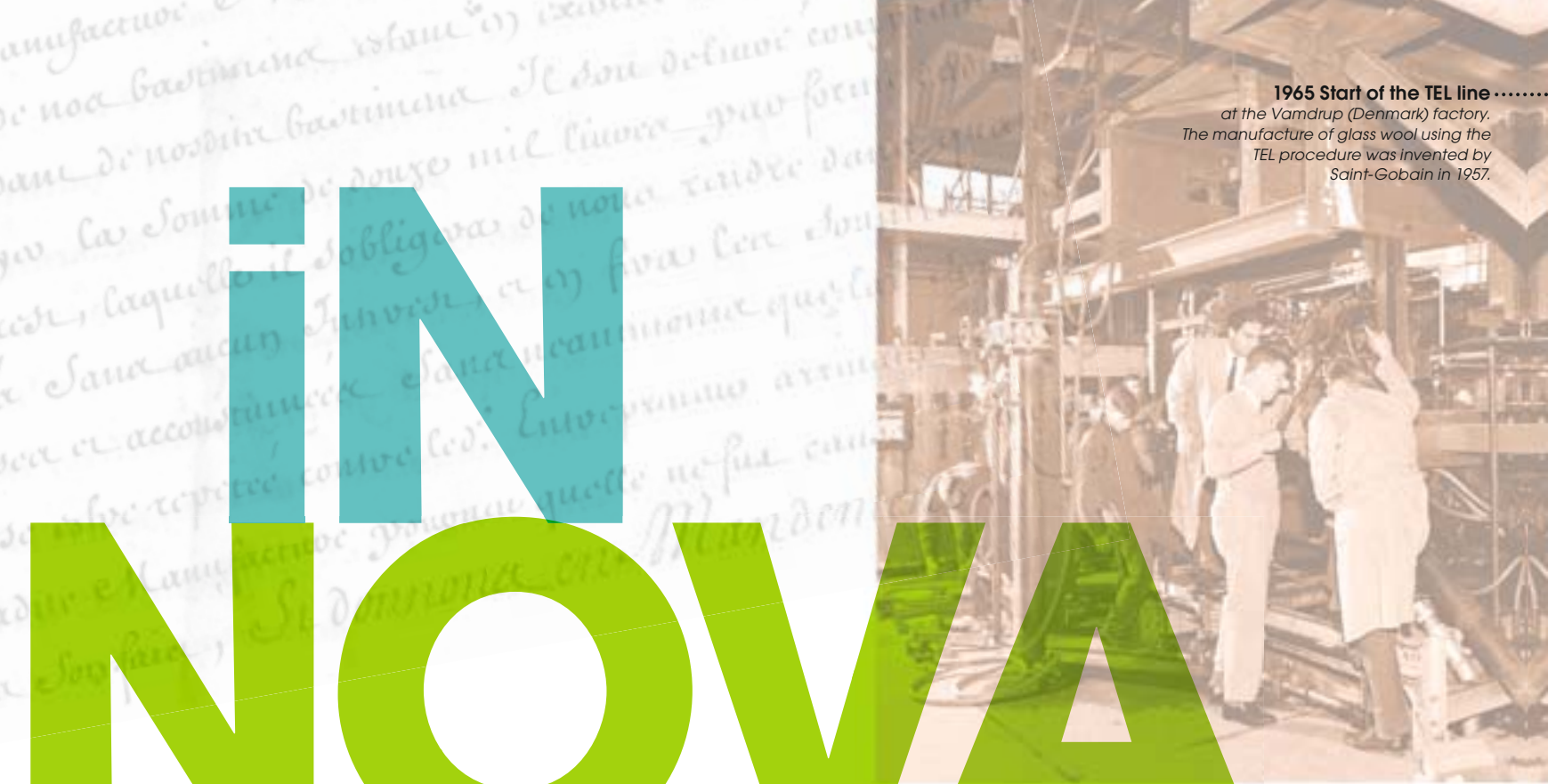
The Foundation supported the renovation of a deaf children's theater in Nizhny Novgorod. The brands ISOVER, Weber, Vetonit, Gyproc and Ecophon also donated materials.

### Mexico .....

The Foundation sponsored work to enlarge a school for children suffering from Trisomie 21 and living in unstable conditions, in Cuernavaca.







1965 Start of the TEL line .....  
at the Vamdrup (Denmark) factory.  
The manufacture of glass wool using the  
TEL procedure was invented by  
Saint-Gobain in 1957.

# INNOVATION

is transforming  
the  
world

Saint-Gobain is one of the world's Top **100 most innovative companies**, and one in every four products currently sold by the Group did not exist five years ago. **Innovation is in the DNA of Saint-Gobain**, and is a key factor in its development. **Inventing innovative and high-performance products and solutions** to improve our habitat and daily lives is an **ambitious task**, one which Saint-Gobain has taken on, in close partnership with **its customers**.



2013 NASA's Mars lander Curiosity .....  
is equipped with Saint-Gobain  
high-performance products.

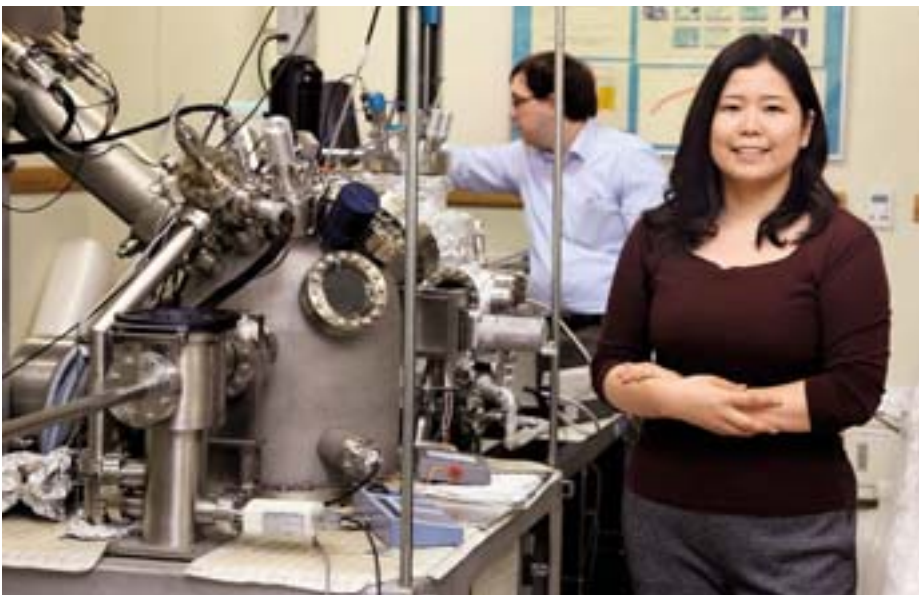




# Saint-Gobain, one of the Top 100 **MOST INNOVATIVE** companies in the world

## *R&D at the heart of the Group's strategy*

Research and Innovation are integral to Saint-Gobain's strategy and sustainable development policy. The Group's ongoing measures to develop its culture of innovation are bearing fruit. For the fourth consecutive year, Thomson Reuters' Top 100 Global Innovators has ranked Saint-Gobain among the 100 most innovative organizations in the world. The Group will continue its efforts in coming years, in particular with regard to investments, in order to maintain and expand its leadership positions in its Activities and to maintain a high level of performance and operational excellence.



LINK (Laboratory for Innovative Key Materials and Structures), a mixed international research unit, in partnership with the CNRS, the Japanese Materials Science Institute NIMS, and Saint-Gobain, opened at Tsukuba (Japan) in October 2014.



The Thomson Reuters award based on the volume of patents, the number of patents accepted compared to the volume filed, their international scope and their reputation.



€400  
MILLION  
IN R&D

350  
NEW PATENTS

3,700  
PERSONS

One of the  
100  
LARGEST FILERS  
WITH THE EUROPEAN  
PATENT OFFICE

Approximately  
900  
RESEARCH  
PROJECTS

**Housing and daily life, which are at the heart of its strategy,**  
are important responsibilities and sources of motivation  
for Saint-Gobain's teams.

## *Strategic and cross-functional R&D programs: growth drivers for the Group*

Saint-Gobain's research and development teams operate according to the logic of management by project. This method of operation allows it to conduct research and development activities while looking far upstream at considerations relating to markets, industrial property, production, respect for health and the environment. This organization ensures a continuous flow of innovations to be launched on the market at the appropriate time.

The main task of R&D is active and proactive support for the Group's numerous Activities through targeted research projects. Its second task is to contribute to the Group's development and growth through strategic R&D programs. The third task is to prepare the future of the Group's business lines and their development through cross-functional R&D programs, by anticipating major changes in techniques and markets.



## Saint-Gobain's R&D Programs

### Strategic

- Active glazing
- High-performance insulation systems
- Exterior insulation systems
- Functional flexible films
- Lighting
- Energy efficient and environmental friendly processes
- Solid oxid fuel cell (SOFC)
- Energy storage

### Transversal

#### Material Science

- Physics and chemistry of inorganic binders-based materials
- Green chemistry
- Recycling
- Organic and inorganic foams

#### Building Science

- Acoustics
- Air quality
- Energy performance, thermal and visual comfort
- Fire performance



# INNOVATING

for and with

# customers

Saint-Gobain's customers remain the focus of its approach to innovation. It remains constantly attentive to the markets, while cultivating academic and commercial partnerships to develop, and often co-develop, high value-added solutions.

OVER THE PAST TWO YEARS,

16

**NEW AND RENOVATION  
"MULTI-COMFORT" PROJECTS**

have been completed in collaboration with a number of partners.

## *Innovating with our customers*

Saint-Gobain's development strategy, and the progressive transformation taking place in the housing markets, position the Group in a dynamic of openness and attention to its customers' needs. To address current expectations and anticipate those of the future, Saint-Gobain is opening itself more broadly to a culture of partnership and joint development.

Saint-Gobain equips buildings with differentiated and high value-added solutions, particularly in the area of comfort. As proof of the effectiveness of its solutions and to further develop research and innovation, a number of the Group's Activities are associated in many countries with the "Multi-Comfort" concept. In this context, housing construction and renovation operations have been launched by the Group's Activities in collaboration with players in the construction industry.



### **All Multi-Comfort worksites**

*in various countries assist Saint-Gobain's teams to better understand house performance as a reflection of occupant behavior and of the Group products installed, and to develop new, .... increasingly effective solutions.*

***Mobilizing all internal and external resources for our customers***

To accelerate the process of innovation, Saint-Gobain uses internal processes that combine the work of R&D, production, marketing and sales teams throughout projects, so as to ensure that all necessary skills are available for successful implementation.

Further, ecosystem complexity and the accelerating pace of technological developments require enhanced collaboration with outside players to supplement the Group's expertise. Saint-Gobain is therefore continuing its policy of remaining open to innovation through its network of universities. Collaboration in the area of building physics was also strengthened in 2014, in particular with the Fraunhofer Institutes (Germany) and with Salford and Leeds Beckett Universities (United Kingdom). The Group is also seeking new markets through NOVA External Venturing, its dedicated external innovation department responsible for relations with start-ups.

**+ 2,600**  
START-UPS ANALYZED

**+ 65**  
PARTNERSHIPS SIGNED  
AROUND THE WORLD



The NOVA External Venturing department regularly holds an Innovation Competition that rewards start-ups aspiring to develop and market the most innovative housing, energy and environmental solutions.

**NEARLY**  
**50%**

of partnerships were entered into at the recommendation of Saint-Gobain employees.



**DOMOLAB, THE FIRST HOUSING INNOVATION CENTER, INAUGURATED IN 2011 IN AUBERVILLIERS (FRANCE).**

Saint-Gobain's housing innovation centers have been created to foster exchanges with major players in the construction market, and to contribute technical solutions adapted to their needs.



# Eco-innovation to support **OUR SUSTAINABLE** habitat strategy

To offer sustainable products to its customers, Saint-Gobain follows a rigorous and transparent policy of assessing the impact of its products. Its goal? Non-polluting sustainable materials, proprietary plants to manufacture them and solutions today to recycle them tomorrow.



The LCA of  
a construction product

## An eco-innovation policy based on life cycle analysis



Ecova line bottles

This policy of eco-innovation is shared with all the Group's Activities and applies to products and solutions offered for markets other than housing.

To reduce the environmental impact of their solutions, the Group's Activities work at all stages of the life cycle, from choosing raw materials to the product's end life, including the utilization phase. For Saint-Gobain, the efficient use of resources is a top priority. To meet these challenges, the Group has implemented an eco-innovation policy based on the use of Life Cycle Analyses (LCA). These analyses allow the Group to quantify and scale the environmental impacts of a solution at each stage of its life cycle. Innovations such as **Weber's col flex éco**, an adhesive mortar with a 56% smaller CO<sub>2</sub> footprint, have also been introduced.

# Over 300

EMPLOYEES TRAINED IN ECO-INNOVATION IN 2014



SGS Lightweight windshield

## Environmentally friendly solutions

The environmental performance of our products, as demonstrated from LCAs, is communicated to our professional customers, specifiers, builders or distributors in the form of Environmental Product Declarations (EPD) verified by independent third parties. This information may be used when assessing the overall environmental performance of a building, particularly within the

context of building certifications such as LEED, BREEAM, DGNB, or HQE.

The results of the LCAs also make it possible to demonstrate that the benefits provided by the Group's solutions, particularly in terms of energy consumption, often far exceed the impacts associated with their production.

In France, ISOVER is supported by its 330 EDPs, 160 of which are available on the national INIES database, demonstrating that its glass wool saves up to 200 times the energy needed to produce it.





# Innovation **FOR OUR HABITAT** and for everyday living

Housing, both new and renovated, is Saint-Gobain's reference market. The Group is also well positioned in fast-growing industrial markets. For 350 years, Saint-Gobain has been inventing solutions to improve daily life.

Since the late  
**17th**  
century

#### Glazing for vehicles

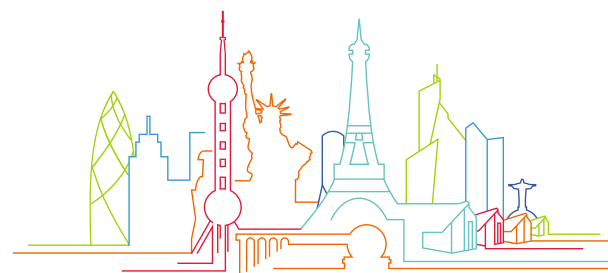
The saddlers who manufactured the King's carriages were supplied with panes of glass for the windows from the *Manufacture royale des glaces* used by Parisian mirror-makers. In the 18th century, vehicles multiplied on the streets of Paris, and with them the use of small windows to seal the doors. These windows met the same need as the windshields of automobiles invented two centuries later: protection against cold, and allowing light to penetrate.



Since the  
**19th**  
century

#### Spectacular glass architecture

Saint-Gobain contributed to the flourishing of a new iron-and-glass architecture throughout Europe, especially in major public facilities: covered markets, railway stations and covered arcades. Built between 1867 and 1878, in downtown Milan, by its sheer scale the Galleria Vittorio Emanuele far surpasses all previous constructions in this domain. The Galleria met with such success that 'twin' arcades were constructed in Berlin, Turin, Genoa and Naples.



Since the  
**19th**  
century



**Municipal castings**

Saint-Gobain PAM's municipal casting products form part of the streetscape of cities around the world. Designed to withstand the test of time, the product line has been enhanced by new functions. Currently, certain castings are equipped with a smart chip to help municipalities to better manage their networks. The Color By PAM service offers 110 facing colors to better integrate products into the urban landscape, and thus contribute to enhancing the value of historic city centers or heritage sites.

Since  
**1912**



© Bourdon 1912

**Laminated glass**

Edouard Benedictus founded Société du Verre Triplex (which merged with Saint-Gobain in 1927) to produce laminated glass, which he had just invented. This consists of two sheets of glass sandwiching a sheet of plastic: in case of breakage, the glass fragments remain attached to the plastic. Laminated glass allowed the nascent automobile industry to improve user safety. Currently, it is used in buildings both because of its safety properties and because of its acoustic insulation.

Since the  
**1910s**

**Mortars of all colors**

Weber began selling his mortars in the United States in the 1910s under the name "Caen Stone," a reference to the limestone found near Caen, in Normandy, which is held in high regard in the USA. Completed in 1913, the Woolworth Building, which owes its whiteness to Weber's "Caen Stone," was one of the first skyscrapers in the New York Borough of Manhattan. Weber's current line of mortar products includes thousands of tints.





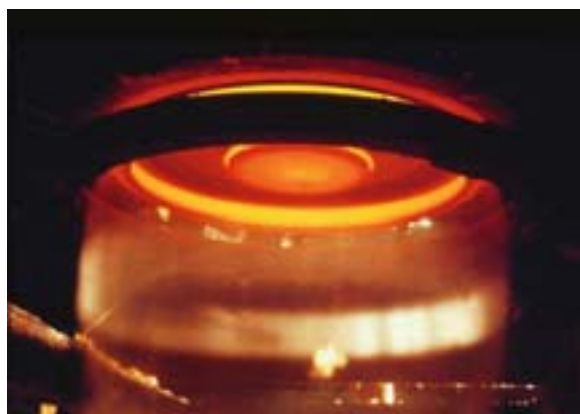
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Since  
**1957**

#### Glass wool using the TEL process

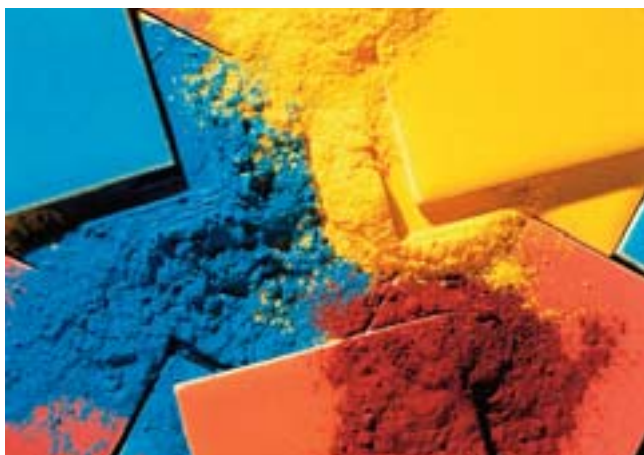
In 1957 the TEL process (which combines centrifugal force and the action of a hot gas jet to stretch the glass), perfected by Saint-Gobain, supplanted those of all its competitors.

Saint-Gobain had already been producing this material for twenty years, but TEL decisively contributed to extending the Group's area of influence, particularly in Brazil and the United States. An excellent thermal and sound insulator, Saint-Gobain ISOVER's glass wool is today used in industry, transportation, and especially in the building industry.



---

Since  
**1975**



#### Magic beads and powders

ZirPro's zircon beads and powders were created out of Saint-Gobain's desire to find new outlets for its oxide fusion technology, used up to then exclusively for refractories. Beads perform the micro-grinding of industrial minerals and paint dispersion. The powders are used to manufacture strong-colored pigments, targeting ceramic tile enamel manufacturers. Currently, applications are widespread: from paper to paint, from mining to aerospace, from metallurgy to jewelry, including mass-market electronics in which the beads are used in the surface treatment of smartphones.

---

Since the  
**1990s**

#### Glass for high altitudes

Saint-Gobain has perfected Solidion® glass, a laminated glass of three thicknesses, chemically reinforced, specially researched to decrease weight in cockpit windows of airliners and to resist bird impacts at over 500 km/h, as well as cabin pressure. Solidion® glass windows equip airlines, private jets and helicopters. Saint-Gobain was specifically chosen as exclusive supplier of the cockpit windows for the Airbus A380 and A350 aircrafts.



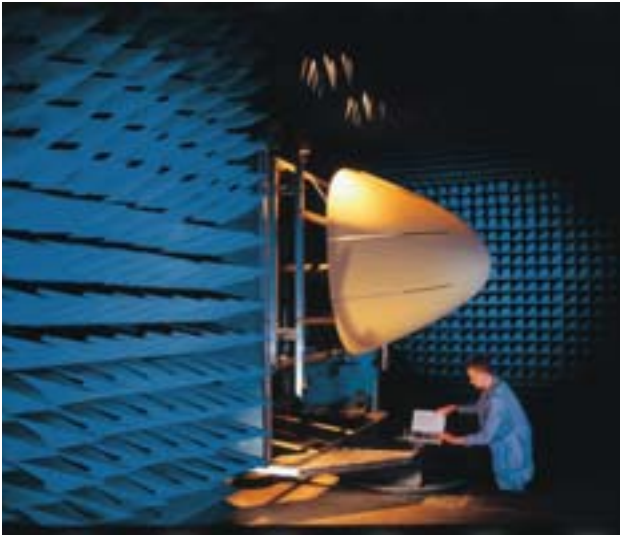
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## Between the two World Wars

#### Bottles for all tastes

Burgundy, Bordeaux, Champagne: each of the major wine regions is identified in France by a particular bottle shape. As the practice of bottling wine in glass became widespread in the 18th century, different bottle shapes developed and have now become true ambassadors of the wines they contain. Verallia, a subsidiary of Saint-Gobain, manufactures the entire range, which is a technical challenge, particularly for the larger sizes (like Nebuchadnezzar size champagne bottles, which contain 15 liters!).

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Since the  
**1960s**

#### Radomes

Saint-Gobain manufactures aircraft radomes. These composite material domes protect the antenna of weather radars and satellite communications systems from bad weather conditions and shocks. Today, thanks to Saint-Gobain's radomes, which now use composite quartz-based fabrics, it is possible to browse the Internet and watch television directly on board aircraft.

Since  
**2014**



#### Magnetic plaster

Launched in Great Britain, British Gypsum's magnetic plaster is revolutionizing interior spaces. No more glue marks on the walls thanks to the innovative properties of this product: magnets attach directly onto the wall without the need for any other material. Suitable for decorating walls in all environments, this product is applied as a solution using traditional plaster.

Since  
**2013**



#### Luminous fabrics

A true aesthetic and technical revolution, ONIRYS™, Saint Gobain Adfors's exclusive luminous fabric was created by combining optical fiber and glass wool into a single fabric. This flexible and fine fabric, intended for panels, curtains and wall treatments, may be customized to give free rein to the creativity of designers.

Since  
**2014**

#### SGG TIMELESS®

Saint-Gobain has launched on the European market SGG TIMELESS®, a low-maintenance glass made so that shower wall panels remain impeccably clean. Its lasting transparency is obtained by applying an almost invisible layer of metal oxides to the clear glass. The product is easy to clean: water rapidly runs off the glass surface, reducing calcium deposits.





1878 Hand transportation.....  
of a large sheet of mirror glass to  
the Mannheim (Germany) plant.

# TAL ENT

is  
infinite

Saint-Gobain has over **180,000 employees** and yet there is still a feeling of belonging to the **same family**. Saint-Gobain is a largely decentralized group, with teams comprising a **community of entrepreneurs acting in solidarity**. The community is united by strong values, as stated in the **Principles of Conduct and Action**, with compliance a condition for belonging to the Group. Next, it is a community of entrepreneurs because, despite its size, Saint-Gobain **encourages its employees to innovate** in their day-to-day professional lives, and trains them with that goal in mind. Finally, they are a community of **entrepreneurs acting in solidarity** because teams are careful to preserve the **Group's collective interests** while remaining open to the world around them.



2013 Researcher .....  
at the Chanteraine  
(France) Research and  
Development Center



# A RESPONSIBLE group

Saint-Gobain shows great loyalty towards its 180,000 employees - a loyalty they reciprocate; it is not unusual for someone to work their entire career in the Group. The deep roots of this loyalty are the company's strong values, which are cultivated through an ambitious human resources policy.

*Values forged by history*

## 5 PRINCIPLES OF CONDUCT

- PROFESSIONAL COMMITMENT
- RESPECT FOR OTHERS
- INTEGRITY
- LOYALTY
- SOLIDARITY

are the basic values uniting management and employees and comprising each employee's Principles of Conduct.

## 4 PRINCIPLES OF ACTION

- RESPECT FOR THE LAW
- CARING FOR THE ENVIRONMENT
- COMPLIANCE WITH WORKPLACE HEALTH AND SAFETY GUIDELINES
- RESPECT FOR EMPLOYEE RIGHTS

governing the actions of all management and employees in performing their duties.

In 2003, Saint-Gobain adopted nine Principles of Conduct and Action to formalize the values that have guided and inspired the conduct of the Group's activities over time. Translated into over 30 languages, they have been distributed among all Group employees, for whom they constitute both action guidelines and a factor providing cohesion. The Principles of Conduct and Action refer explicitly to the applicable conventions of the International Labor Organization, the Guiding Principles of the OECD (Organization for Economic Cooperation and Development) as they relate to multinational enterprises, and to the OECD Anti-Bribery Convention.



Presentation of the Principles of Conduct and Action to employees at the Barra Mansa, Brazil, site in 2011.



..... 1926

The Arijá glassworks in Spain celebrates its twentieth anniversary: before the corrida, bullfighters pose at the plant's occupational accidents clinic.



..... 2010

Employees learn about safety at a Saint-Gobain site in Korea during the International Environment, Health and Safety Day, which is held every two years at all Group sites around the world.



..... 2014

International Environment, Health and Safety Day at the Group's headquarters in Paris.

## Health and safety, central values of the Group

Thanks to its history and wide-ranging social dialog, Saint-Gobain's human resources policy seeks to offer each employee a work environment conducive to professional and personal growth. To do this, job safety and health are requisites. These are central Saint-Gobain values in its management of its industrial activities, distribution and research. They originate from a strong desire on the part of the company, strengthened by the commitment made by every employee. Updated in 2013, the EHS Charter is displayed at all the Group's sites. It presents the Group's EHS aims to all visitors, and reminds employees: zero work accidents, zero work-related illness, zero environmental accidents, and a minimum impact of our

activities on the environment. This approach is used by all the Group's businesses, and seeks to make safety integral to the corporate culture. This value is applied by all employees and at all management levels. The goal is for each person to contribute to his or her own safety and that of his or her colleagues.

In 2013, Saint-Gobain adopted a Health policy consistent with measures already taken by the Group. All Group sites around the world must implement it, in accordance with their local regulations, and in addition to the industrial safety and health tools already in place. Saint-Gobain's goal is to collectively protect the health of its employees, temporary staff and

subcontractors working at its sites around the world, by anticipating and preventing the risks of occupational illnesses or disability. The second aspect of the Group's health policy relates to respecting the health of its customers and the users of its products and services. The health of local residents is the third part of this policy. Sites take measures to reduce potential environmental impacts that may have consequences on neighboring residential areas: sound nuisance, atmospheric emissions and water, soil and subsoil emissions.



# AN OPEN group

In a spirit of openness, in 2012 the Group launched the “OPEN” (Our People in an Empowering Network) program: Opening up to the outside world so that it can be attentive to and provide responses to customer needs, and internal openness, both as teams and as individuals, to stimulate discussion, innovation and the capacity for differentiation. Four action priorities are combined under the “OPEN” program.



## *Promoting and enhancing* professional mobility

In 2014, **572 managers** were transferred between Activities, **878** were involved in functional transfers, and **200** in geographic transfers.

Professional mobility is the best way of contributing to diversity, developing innovation, enhancing the collective skills needed for the Group's activities, and enriching the careers of employees in return. To foster all forms of mobility (geographic, functional or between activities), long-term initiatives are taken: mobility committees, succession plans, mobility charters, standardization of personal review processes, computer platforms for job postings and applications, etc. Finally, in the context of reorganization plans, Saint-Gobain promotes mobility agreements.



## *Diversifying* teams

Currently, **46% of Group managers** originate from countries other than France.

Diversity ensures that the Group is responding to the world around it while developing its capacity to innovate. Wherever it is present, Saint-Gobain seeks to promote diversity in all forms: between genders, nationalities, professional career paths, generations, and disabled status. This commitment is supported by a proactive hiring policy and action plans for professional promotion, salary equality, training, and a balance between the professional and personal lives of employees. Saint-Gobain's women's networks, which are being created everywhere in the world, foster a culture of gender balance. To promote a multidisciplinary environment and a diversity of nationalities, emphasis is placed on encouraging diversified career paths in the various business lines (marketing, research and development, etc.), as well as on establishing local manager teams.



## Strengthening employee commitment

In 2014, Saint-Gobain obtained **Top Employer 2014 certification in seven countries**: United Kingdom, France, Brazil, China, Germany, Italy, and Poland.

Saint-Gobain seeks to be a reference company with regard to safety, health and work conditions. To achieve this, four managerial attitudes guide and commit employees in management positions: always acting consistently with Group values: concern for teams and for each individual; saying what one does and doing what one says; and prohibiting any complacency. In addition, for 27 years, the shareholder program has offered employees the opportunity to become shareholders under preferential conditions. Finally, to specifically address social issues, local dialog is given priority. In an uncertain economic environment, Saint-Gobain is committed, as far as possible, to implementing solutions to save jobs and to only make headcount reductions as a last resort, in consultation with its employees.



## Developing talent

In 2014, the share of **employees who received training totaled 72.9% of the workforce, and each employee received an average of 23.9 hours of training per year.**

Saint-Gobain's ambition: to be a benchmark employer, known and recognized for the variety of the professional career paths it offers. The Group's training efforts enhance the skills and expertise of its employees. Saint-Gobain is developing specific training programs worldwide, by business line, implemented locally. The "Saint-Gobain Talents" program identifies managers who show significant growth potential or key skills. The preparation of personal reviews and succession plans, mentoring and relations with the Group's target schools and universities strengthen this process.





# The faces **OF SAINT-GOBAIN** around the world

Each year, Saint-Gobain employees are invited to participate in an internal photo contest; shown here is a selection of shots from 2014, the theme of which was “Your reasons to believe in the future.”



## France

“BELIEVING IN THE FUTURE BECAUSE  
OUR INDIVIDUAL CREATIVITY IS AT  
THE GROUP’S SERVICE.”

An employee of the Pum Plastics distribution brand



## Mexico

“BELIEVING IN THE FUTURE BECAUSE OUR COMMITMENT IS  
EXPRESSED IN THE QUALITY OF OUR PRODUCTS.”

Saint-Gobain Sekurit (automotive glass) operator

# Thailand

“BELIEVING IN THE FUTURE BECAUSE  
THAILAND IS THE LAND OF SMILES.”

Two Saint-Gobain Sekurit (automotive glass) employees  
⋮



# Poland

“BELIEVING IN THE FUTURE  
BECAUSE TEAM SPIRIT MAKES US  
INVINCIBLE”

A Weber team member (mortars)  
⋮



# England

“BELIEVING IN THE FUTURE  
BECAUSE WE ARE THE ‘FAB  
FOUR’ OF SAFETY”

A Gibbs & Dandy distribution brand  
team during the 2014 International  
Environment, Health and Safety day



## Main adresses

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France  
Head office

#### Head office

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France

Mailing address: Les Miroirs  
92096 La Défense Cedex  
France

Tél.: +33 (1) 47 62 30 00  
www.saint-gobain.com

#### Innovative materials

##### Flat glass

Tél.: +33 (1) 47 62 34 00

##### High-Performance Materials

Tél.: +33 (1) 47 62 37 00

#### Construction products

Tél.: +33 (1) 47 62 45 00

#### Building distribution

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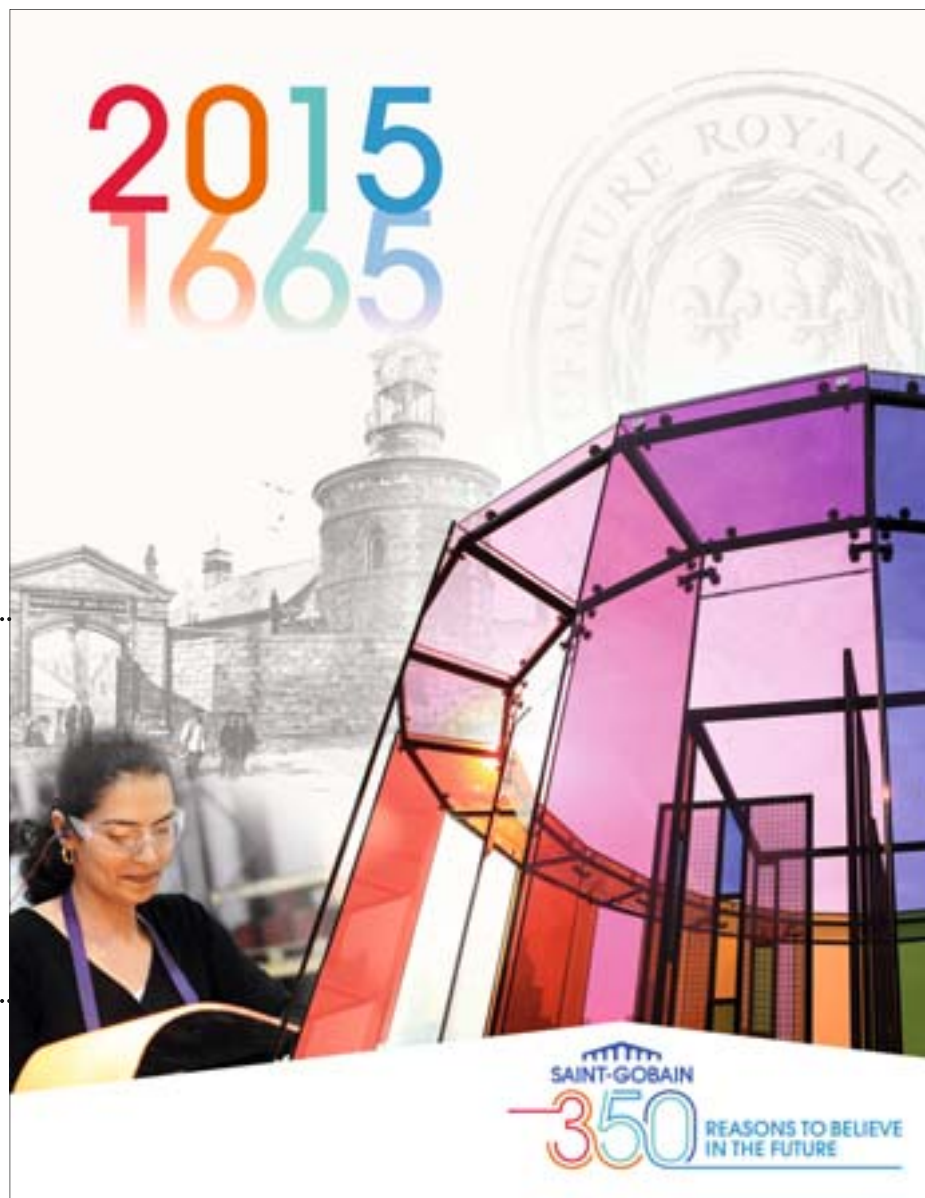
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.....Stamp of the *Manufacture royale des glaces*, late 17th - 18th centuries

.....“Color” pavilion created for Saint-Gobain’s 350th anniversary, 2015

Entrance to the Saint-Gobain factory (Picardy, France), engraving dated 1898

Operator.... in an abrasives plant, 2009



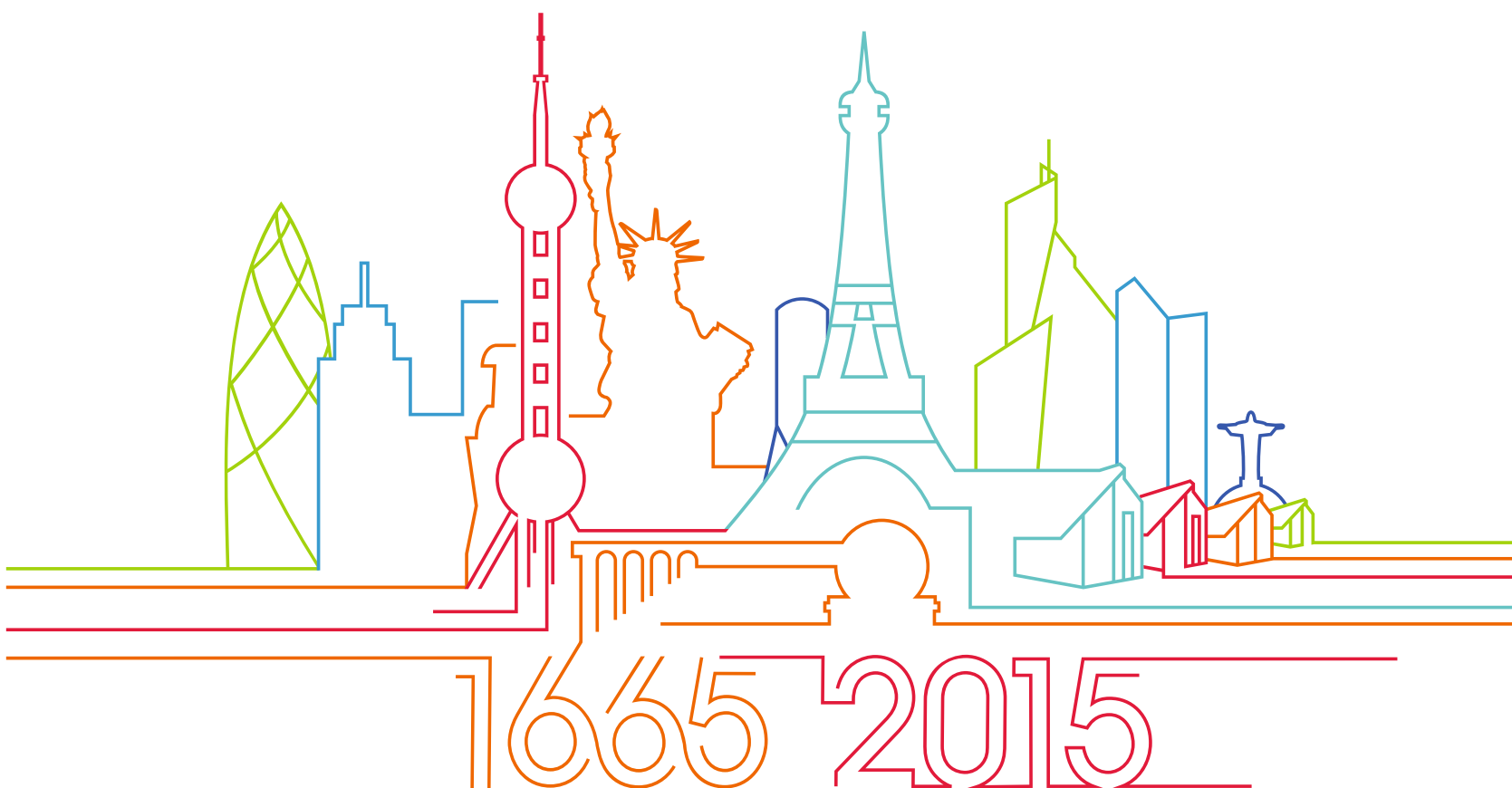
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## IN 2015, CELEBRATE SAINT-GOBAIN'S 350TH ANNIVERSARY WITH US

- By joining us on the **saint-gobain.com** website
- By visiting the 350th anniversary exhibition on **saint-gobain350years.com**
- By following us on social networks



- By sharing the hashtag **#SaintGobain350**



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