

# Business Line Coating Additives

Evonik  
Resource Efficiency Segment

January 2015



**EVONIK**  
INDUSTRIES



### Nutrition & Care



**Sales**  
€4,924 m



**Adj. EBITDA / Margin**  
€1,435 m / 29.1%

Animal Nutrition

Baby Care

Health Care

Personal Care

Household Care

Comfort & Insulation

Interface & Performance



### Resource Efficiency



**Sales**  
€4,279 m



**Adj. EBITDA / Margin**  
€896 m / 20.9%

Silica

Crosslinkers

Oil Additives

Coating & Adhesive Resins

High Performance Polymers

Active Oxygens

Silanes

**Coating Additives**

Catalysts



### Performance Materials



**Sales**  
€3,435 m



**Adj. EBITDA / Margin**  
€309 m / 9.0%

Performance Intermediates

Acrylic Polymers

Acrylic Monomers

Functional Solutions

Agrochemicals & Polymer Additives

CyPlus Technologies

<b>1</b>	<b>Coating Additives at a glance</b>
2	Key success factors
3	Growth drivers

## Business at a glance

Leading supplier for high performance additives and specialty resins



Top  
#2

supplier for  
high performance additives  
and  
specialty resins

25

innovation partnerships  
with leading customers

GDP+++

annual sales growth  
over last 10 years

>450

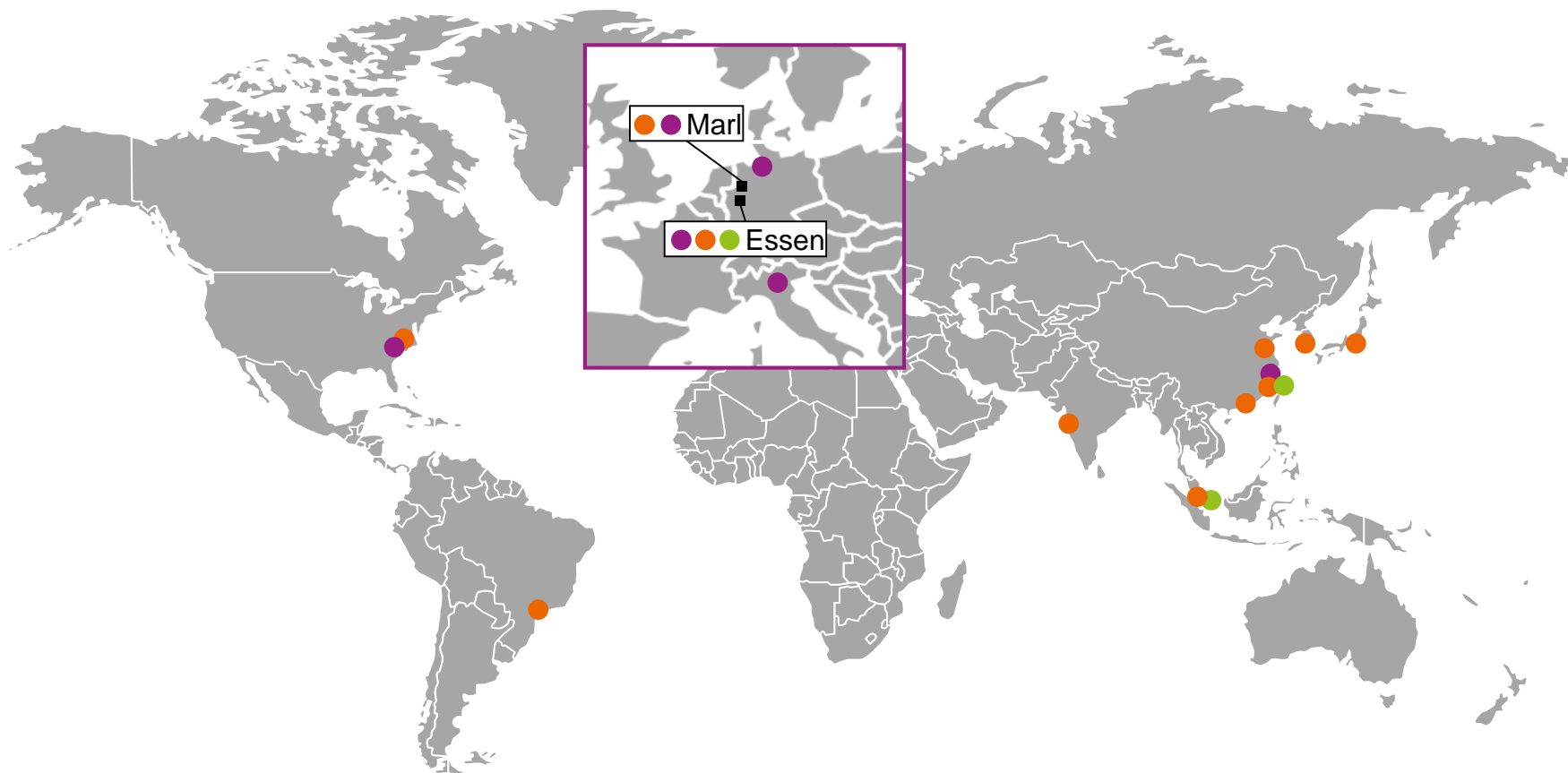
tailor-made products for  
broad spectrum of  
applications in diversified  
end markets

>5%

R&D ratio

# Global customer access

Customer service labs in all major regions



● Production sites

● Customer service labs

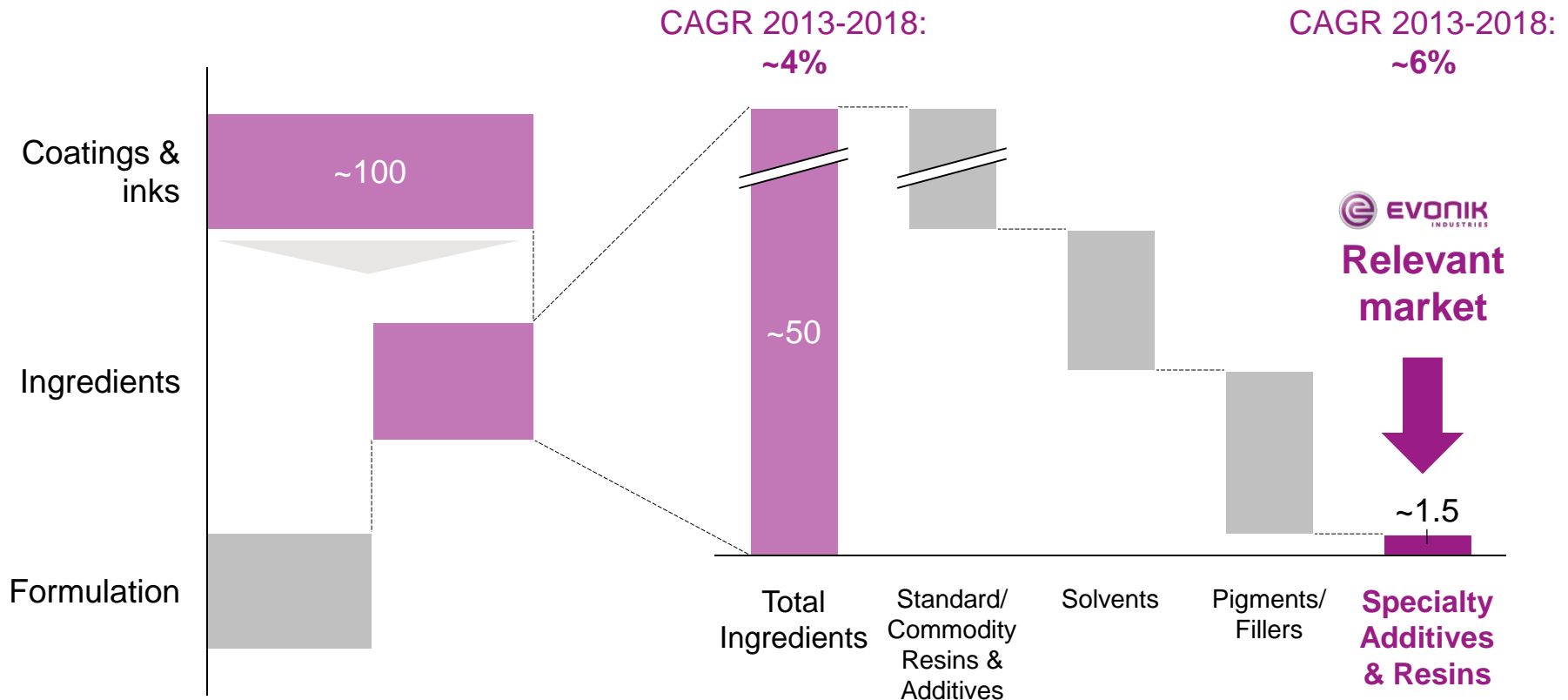
● Innovation centers

# Niche positioning in coatings & inks market

## Attractive “low-volume – high impact” business

Market Split: Coatings & Inks [€ bn]

Coatings & Inks Ingredients Market [€ bn]








Main competitors:



# Major Applications and Functionalities

Broad application spectrum in diversified end markets

Applications	Functionality examples	
<b>Architectural Paints</b>	<ul style="list-style-type: none"><li>• Water protection of façade paints</li><li>• Defoaming of wall paints</li></ul>	
<b>Printing Inks</b>	<ul style="list-style-type: none"><li>• Improved substrate wetting on packaging materials</li><li>• Gloss increase of packaging inks for better appearance</li></ul>	
<b>Wood Coatings</b>	<ul style="list-style-type: none"><li>• Stronger anti-blocking properties</li><li>• Increased scratch resistance of parquet coatings</li></ul>	
<b>Pigment Concentrates</b>	<ul style="list-style-type: none"><li>• Increased color strength of pigment concentrates for color rich paints</li></ul>	
<b>Industrial &amp; Automotive Coatings</b>	<ul style="list-style-type: none"><li>• Longer lasting durability of industrial &amp; automotive coatings, e.g. by better chemical and weathering resistance</li></ul>	

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<b>2</b>	<b>Key success factors</b>
3	Growth drivers

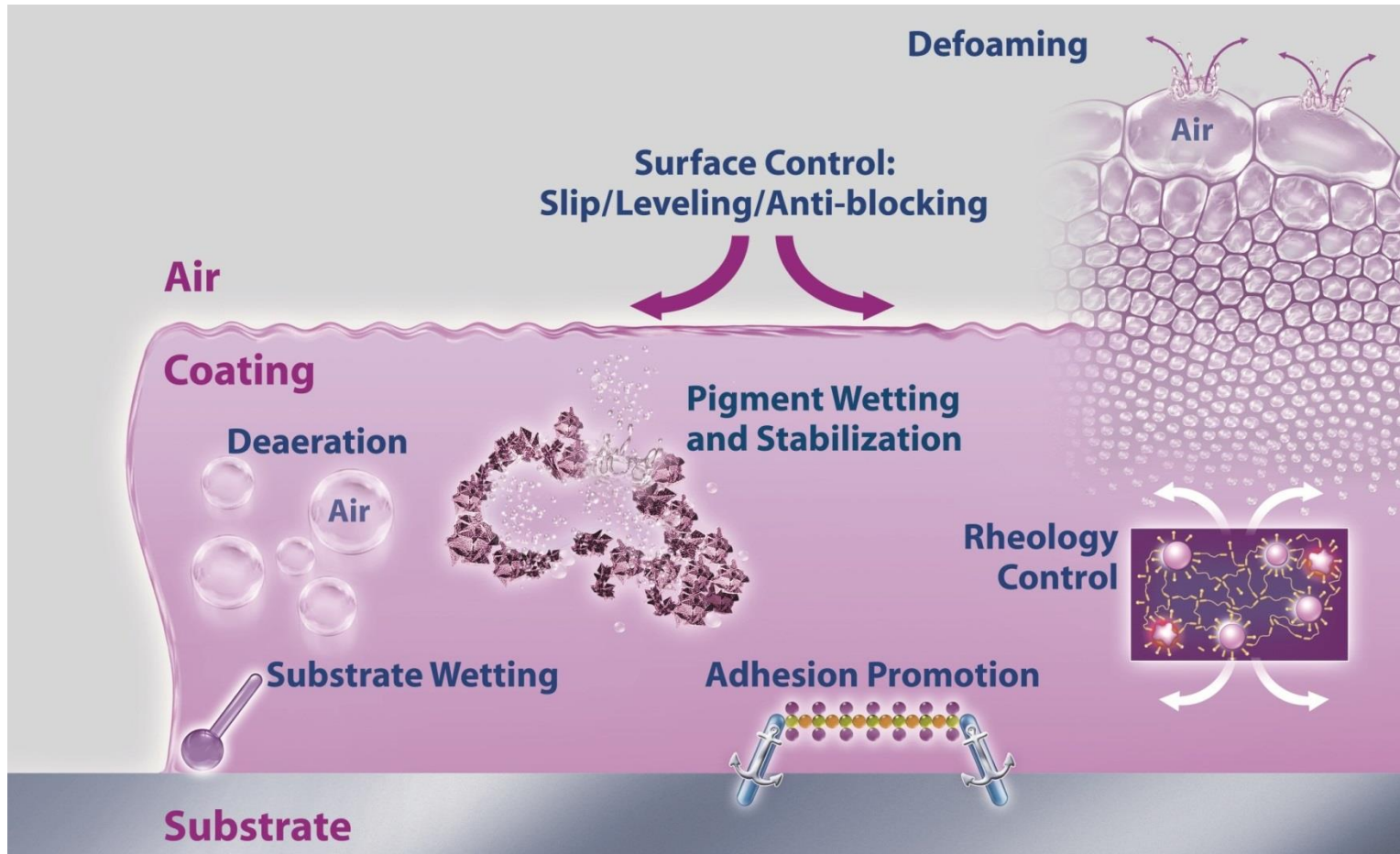


# Extensive application & formulation know how

## Customized solutions for coatings & inks

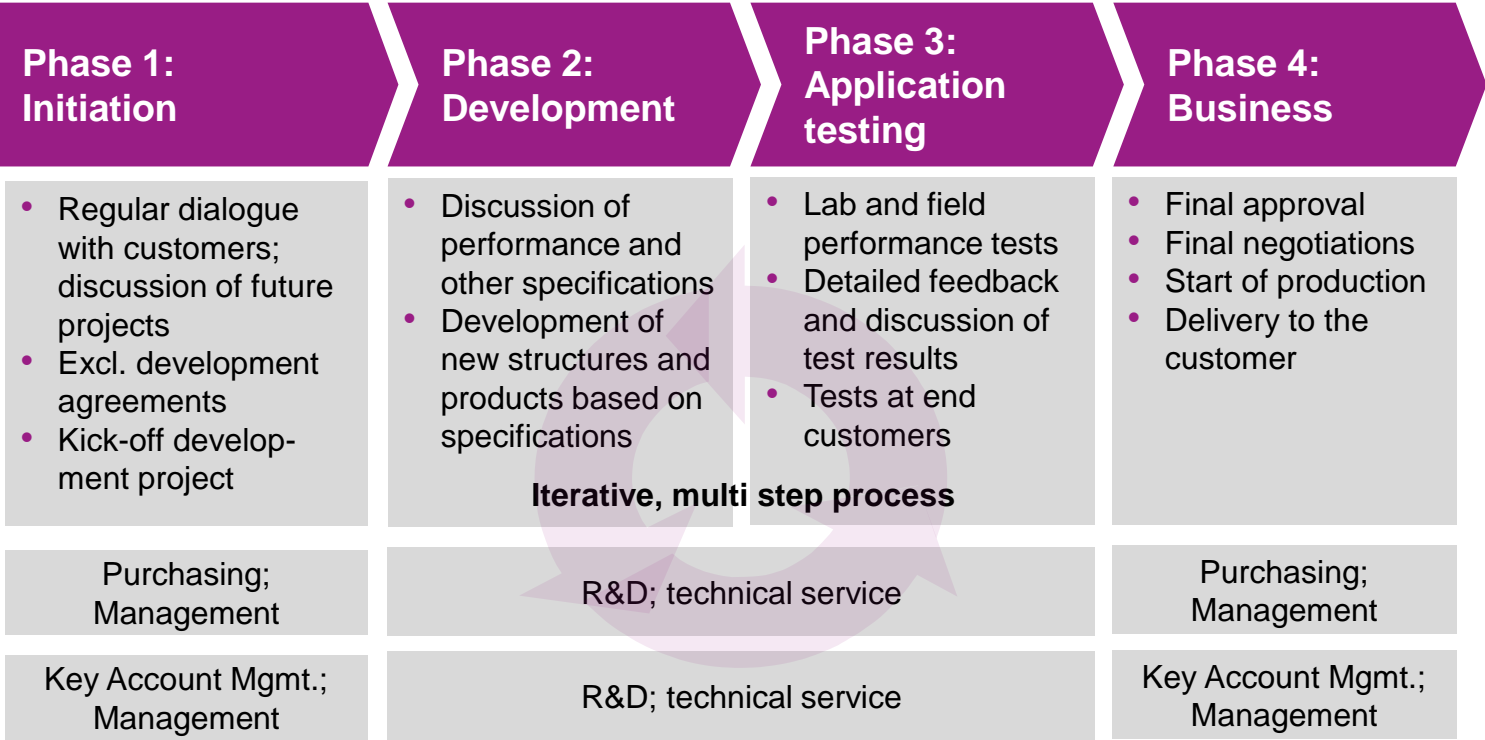


Based on its extensive know how in surface chemistry,  
Coating Additives delivers individual solutions to various issues of coatings and inks



# Partnering with customers

Joint development projects as key element of innovation partnership approach



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# Future growth drivers

With its portfolio, Coating Additives addresses several important trends in coatings & inks market



<b>Trends and growth rates</b>	<b>Environmentally friendly coatings &amp; inks</b>	<b>Modular coating manufacturing</b>	<b>Coatings with increased durability</b>
	5% (waterborne paints) 7% (UV cured coatings)	7 – 8 % (universal grinding systems)	6% (High solid anti corrosion coatings)
<b>Solution examples from BL Coating Additive</b>	<b>TEGO® Foamex:</b> High performance foam control agents	<b>TEGO® Dispers:</b> Dispersants for universal pigment concentrates	<b>SILIKOPON®:</b> Ultra high solid Si-hybrid resins for long-lasting coatings
			

**Coating Additives offers innovative solutions to address current trends in the coatings industry**

# Summary

Coating Additives has set the course to continue the successful growth story in the future



- Leading global position with broad and attractive portfolio
- Mission-critical solutions with high value-added for end customers
- Close strategic customer relations and innovation partnerships
- Tailor-made solutions based on deep understanding of customers' needs
- Strong growth opportunities by addressing current trends in the coatings industry



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