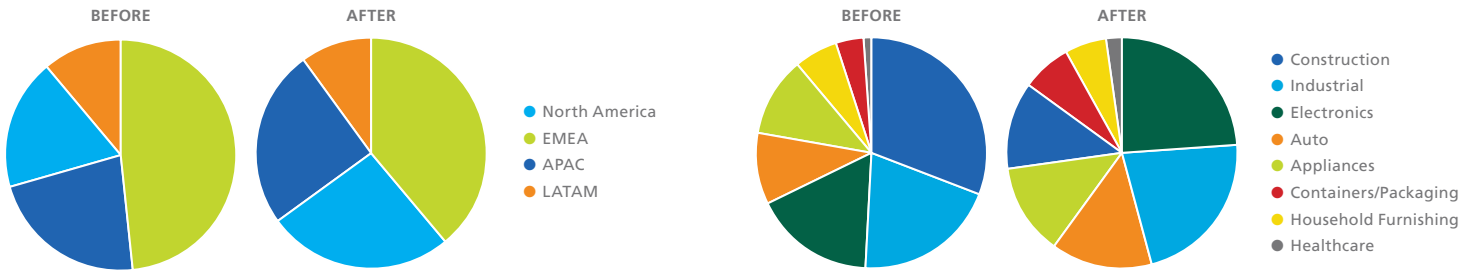


- Shift center of gravity to high-margin, high-value portfolio.
- A more focused, fundamentally stronger and higher value specialty company.

## NEW BALANCED REGIONAL AND END-MARKET MIX



### REGIONAL MIX

- More balanced regional mix with less reliance on EMEA markets
- Within EMEA, shift towards Northern and Eastern Europe, less towards Southern Europe and MENA

### END-MARKET MIX

- Less exposure to the building and construction segments – typically more cyclical and lower growth
- A generally more balanced end market mix

## STRATEGIC PILLARS


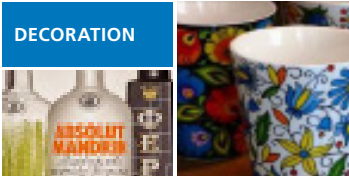

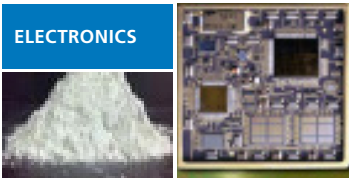

<p><b>✓ SPECIALTY GROWTH</b></p> <p><b>GROWTH FROM A STRONGER SPECIALTY-ORIENTED BUSINESS BASE</b></p> <ul style="list-style-type: none"> <li>■ Scope expansion – leverage macro trends/market tailwinds</li> <li>■ New applications/Product renewal – build on advantaged technology positions and new technology platforms</li> <li>■ An actively managed M&amp;A pipeline</li> </ul>	<p><b>✓ INNOVATION</b></p> <p><b>INNOVATION ALIGNED TO TRENDS AND CUSTOMER NEEDS</b></p> <ul style="list-style-type: none"> <li>■ New technology platforms R&amp;D and product development – sustain a strong product vitality index</li> <li>■ Shift from product-centered to a more solution-driven model</li> </ul>	<p><b>✓ OPTIMIZATION</b></p> <p><b>ONE TIME AND ON-GOING OPTIMIZATION TO DRIVE EFFICIENCY AND INCREASE RETURN ON CAPITAL EMPLOYED</b></p> <ul style="list-style-type: none"> <li>■ Asset footprint optimization/ utilization and other cost reduction opportunities post sale of Tile Coatings</li> <li>■ Ongoing cost reduction/productivity improvement initiatives</li> </ul>
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## AREAS OF OPPORTUNITY



# APPLICATIONS

## FUNCTIONAL COATINGS

	PRODUCT EXAMPLES	APPLICATIONS	STRENGTHS
<b>AUTOMOTIVE</b> 	<ul style="list-style-type: none"> <li>■ Black band glass colors &amp; coatings</li> <li>■ Black enamel</li> <li>■ Conductive silver paste</li> </ul>	<ul style="list-style-type: none"> <li>■ Auto glass, tempered</li> <li>■ glass, sensors</li> </ul>	<ul style="list-style-type: none"> <li>■ Black technology &amp; innovation leader</li> <li>■ Relationship with large, global customers</li> <li>■ Global capacity with local presence</li> </ul>
<b>DECORATION</b> 	<ul style="list-style-type: none"> <li>■ Container glass</li> <li>■ Dinnerware colors &amp; coatings</li> </ul>	<ul style="list-style-type: none"> <li>■ Decal printing</li> <li>■ Color for dinnerware</li> <li>■ Glass decoration</li> </ul>	<ul style="list-style-type: none"> <li>■ Product &amp; technology leader</li> <li>■ Wide product range</li> <li>■ Leading portfolio of unleaded &amp; organic color</li> </ul>
<b>INDUSTRIAL</b> 	<ul style="list-style-type: none"> <li>■ Flat glass coatings</li> <li>■ Structural coatings</li> <li>■ Functional glasses &amp; pigments</li> </ul>	<ul style="list-style-type: none"> <li>■ Architectural and specialty glass</li> <li>■ Dental composites, grinding wheels</li> <li>■ Roof tiles, sanitary ware</li> </ul>	<ul style="list-style-type: none"> <li>■ Superior technical capabilities &amp; innovation</li> <li>■ Broad range of applications</li> <li>■ Digital printing</li> </ul>
<b>ELECTRONICS</b> 	<ul style="list-style-type: none"> <li>■ Electronic packaging materials</li> <li>■ Electronic component materials</li> <li>■ Multilayer materials</li> </ul>	<ul style="list-style-type: none"> <li>■ Glass/ceramic materials in industrial electronic components</li> </ul>	<ul style="list-style-type: none"> <li>■ Leader in select high-value products</li> <li>■ Technical capability</li> <li>■ Customer co-development</li> </ul>
<b>PORCELAIN ENAMEL</b> 	<ul style="list-style-type: none"> <li>■ High-end porcelain enamel</li> </ul>	<ul style="list-style-type: none"> <li>■ Hot water tanks</li> <li>■ Hollowware</li> <li>■ Sanitary</li> </ul>	<ul style="list-style-type: none"> <li>■ Superior quality &amp; innovation capabilities</li> <li>■ Wide product range serving leading customers</li> <li>■ Low cost global production capability</li> </ul>

## COLOR SOLUTIONS

	PRODUCT EXAMPLES	APPLICATIONS	STRENGTHS
<b>PIGMENTS</b> 	<ul style="list-style-type: none"> <li>■ CICP (IR &amp; Cool Colors)</li> <li>■ Ultramarines</li> <li>■ Bismuth Vanadates</li> <li>■ Transparent Iron Oxides</li> <li>■ Anti-Corrosives</li> <li>■ Azo Pigments</li> <li>■ HPPs</li> </ul>	<ul style="list-style-type: none"> <li>■ Paints &amp; Coatings</li> <li>■ Plastics</li> <li>■ Inks</li> <li>■ Building materials</li> <li>■ Textiles</li> <li>■ Cosmetics</li> </ul>	<ul style="list-style-type: none"> <li>■ Technology &amp; innovation leadership</li> <li>■ Superior quality, consistency and purity</li> <li>■ Broad, high-quality pigment portfolio</li> <li>■ Global manufacturing &amp; local tech service</li> </ul>
<b>DISPERSIONS &amp; COLORANTS</b> 	<ul style="list-style-type: none"> <li>■ Thermoset &amp; thermoplastic applications</li> <li>■ Construction applications (plasters, grouts &amp; mortars)</li> </ul>	<ul style="list-style-type: none"> <li>■ Paints &amp; coatings</li> <li>■ Plastics</li> <li>■ Building materials</li> </ul>	<ul style="list-style-type: none"> <li>■ Product Customized solutions &amp; products</li> <li>■ Unique color palettes</li> <li>■ High quality products &amp; services</li> <li>■ Ready-to-use with tailor-made packaging</li> </ul>
<b>SURFACE TECHNOLOGIES</b> 	<ul style="list-style-type: none"> <li>■ Fine powders</li> <li>■ Polishing slurries</li> </ul>	<ul style="list-style-type: none"> <li>■ Automotive</li> <li>■ Precision optics</li> <li>■ Sapphire substrates</li> <li>■ Blue filter glass</li> <li>■ Semiconductors</li> </ul>	<ul style="list-style-type: none"> <li>■ Superior Leader in precision polishes for auto aftermarket and plastic lens applications</li> <li>■ Product development with key customers</li> <li>■ Products with superior quality &amp; functionality</li> <li>■ Formulation and tech service expertise</li> </ul>