



NOVA
External Venturing
Presentation

Cleantuesday - 14 avril 2009



SAINT-GOBAIN

Saint-Gobain Group Overview



Saint-Gobain supplied glass for the Louvre in Paris



- Created 1665
- HQ in Paris
- Plants in 53 countries
- 200,000 employees ww

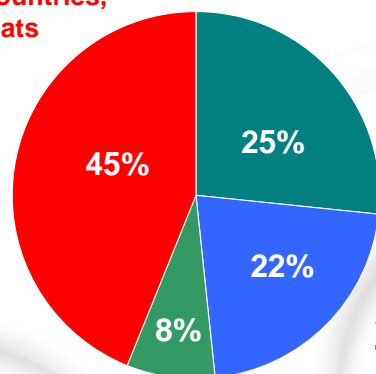
■ A balanced portfolio of activities :
BD, **CP** & **Materials** (HPM + Glass)

Group's Mission Statement :

“Maintain worldwide leadership in construction markets, offering innovative solutions to meet the fundamental global challenges of growth, energy and environment“

Building Materials Distrib. (-1.9%)

→ New countries,
new formats



Construction Products (+1.4%)

→ Energy & Environmental Performance
 → Emerging countries

Materials (HPM + Flat Glass) (+1.3%)

→ R&D in Energy & Environment

Packaging (+7.4%)

Financial figures 2008 (€ billion)

Sales	43.8
Net Income	1.9
Cash Flow	3.4

External Venturing initiative in brief

Started 3 years ago by establishment of a **dedicated team** in Europe, US and Asia

Network organization :

- 6 persons in **Team** (3 full time) with geographical coverage
- 8 persons in Technical **Committee** with business coverage
- Transversal Top Mgmt **Board** and project **Sponsorship**

+1000 companies reviewed, **17 partnerships** agreed and **20 under active** due diligences or discussion

45% US/Can + 40% Europe + 15% Asia

Focused area: Construction Products, Energy and Environment (examples of projects)

LED glass



Photovoltaic plating



Synthetic stone



Phonic insulation



External Venturing Goal

Creation of Partnerships with innovative startups

Start-Up

- ✓ Innovative techno.
- ✓ New products, services or concepts
- ✓ High reactivity and incentives





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- ✓ Access to Global Market
- ✓ Industrial scale manufacturing capability and technologies
- ✓ System development
- ✓ Sound Financial Base

- ◆ Manufacturing agreement
- ◆ Commercialization agreement
- ◆ Joint-Development agreement
- ◆ Licensing In / Out
- ◆ Minority equity investment (some JVs or acquisition)
- ◆ Spinning-in...

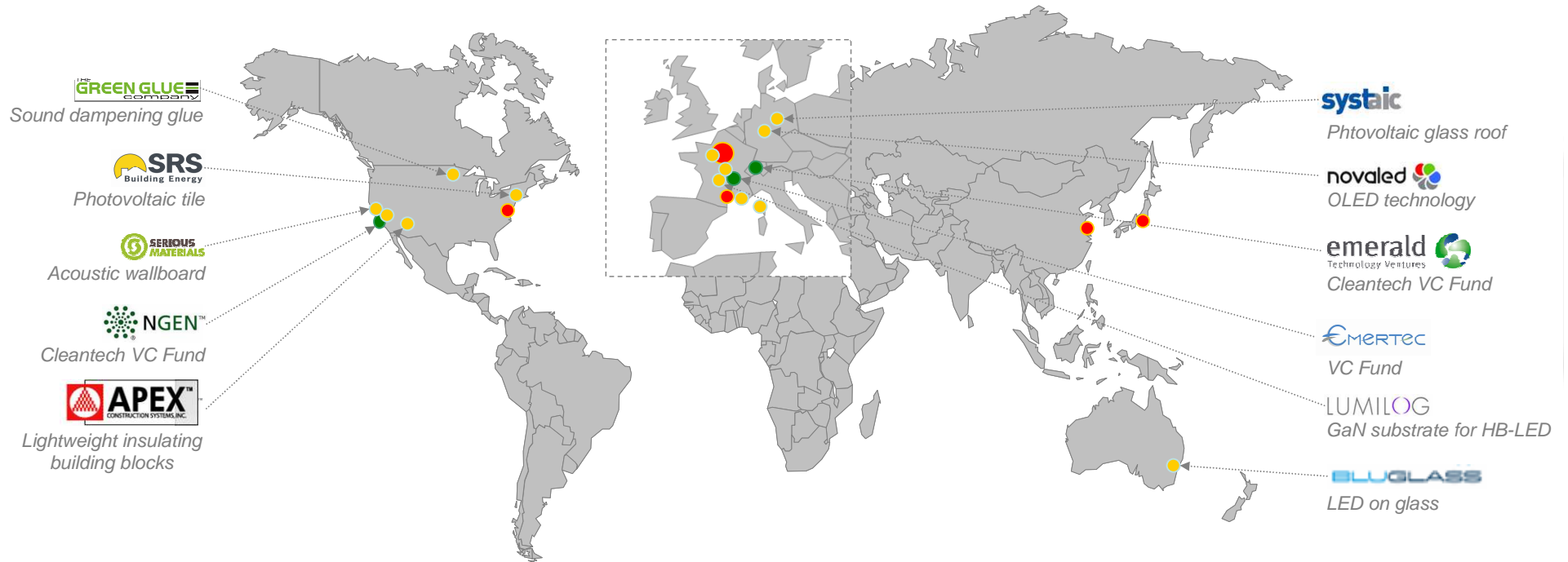
The Venturing team supports the development of the Business, and therefore is fully aligned with Saint-Gobain Group's strategy

Our areas of interest in a nutshell :

- **Building Materials** improving housing comfort, efficiency, security and cost 
- **Services** in Building Industry 
- **Energy** 
- **Clean-technologies** 
- **Lighting** 
- **High Performance** applications enabled by innovation in Ceramics, Crystals, Glass or Performance Plastics 

External venturing Current Footprint

● External Venturing team presence
 ● Fund Investment
 ● Start-up Partnership
(only public deals are disclosed)





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Back-Ups :

- **Strategic Areas of Interest**

Agenda

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High Performance applications enabled by innovation in our Perf. Materials' platforms

Key

Active material platform

Other material of lesser importance for HPM

