



# Welcome to our world of smart adhesives!

**CORPORATE PRESENTATION 2020**



an Arkema company  
[www.bostik.com](http://www.bostik.com)

**ARKEMA**  
INNOVATIVE CHEMISTRY

**Who are we?**



# Bostik belongs to Arkema Group, Specialty Materials player offering innovative and sustainable solutions



A world player of 8.7 billion revenues in 2019, Arkema offers cutting-edge technical solutions to meet the challenges of, among other things, new energies, access to water, recycling, urbanisation and mobility, supported by R&D organised around 6 platforms.



New energies



Bio-based products



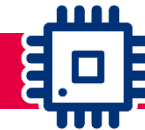
Water management



Home efficiency and insulation



Lightweight materials and design



Electronics solutions

# Bostik, the Adhesive Solutions segment of Arkema



**79%**  
Specialty  
Materials



The percentages represent the share of 2019 sales of each segment.

# Bostik, a world-class leader in sealing and bonding technologies...



**€2.1 billion**  
Annual Sales 2019



**6 000**  
**Employees**

500 + development and technical staff



**4 global**  
**R&D centres**  
Bostik Smart Technology Centres



**Operational excellence**

Committed to safety, operational excellence, health and reduced environmental impact

## An ambitious bolt-on acquisition program

**Den Braven**  
2016

**CMP**  
Pioneering Cement Technology  
2017

**XLBrands**  
Flooring Installation Products  
2018

**Nitta Gelatin**  
2018

**AFINITICA**  
2018

**PROCHIMIR**  
TECHNICAL FILMS  
2019

**LIP**  
2020



# ... with a strong and reliable expertise all over the world

## Americas

Argentina  
Brazil  
Canada  
Chile  
Mexico  
USA



## Africa Middle East

Egypt  
Morocco  
South Africa  
UAE  
Turkey

## Asia - Pacific

Australia  
China  
India  
Indonesia  
Japan  
Malaysia  
New Zealand  
Philippines  
Singapore  
South Korea  
Thailand  
Vietnam

## Europe

Austria  
Belgium  
Bulgaria  
Croatia  
Denmark  
Estonia  
Finland  
France  
Germany  
Greece  
Hungary  
Ireland  
Italy  
Latvia  
Lithuania  
Netherlands  
Norway  
Poland  
Portugal  
Romania  
Russia  
Spain  
Sweden  
Switzerland  
UK  
Ukraine

**49 countries** including 54 technical, distribution, sales and administration centres





# ... and a forward-thinking stance on the market

## Our vision

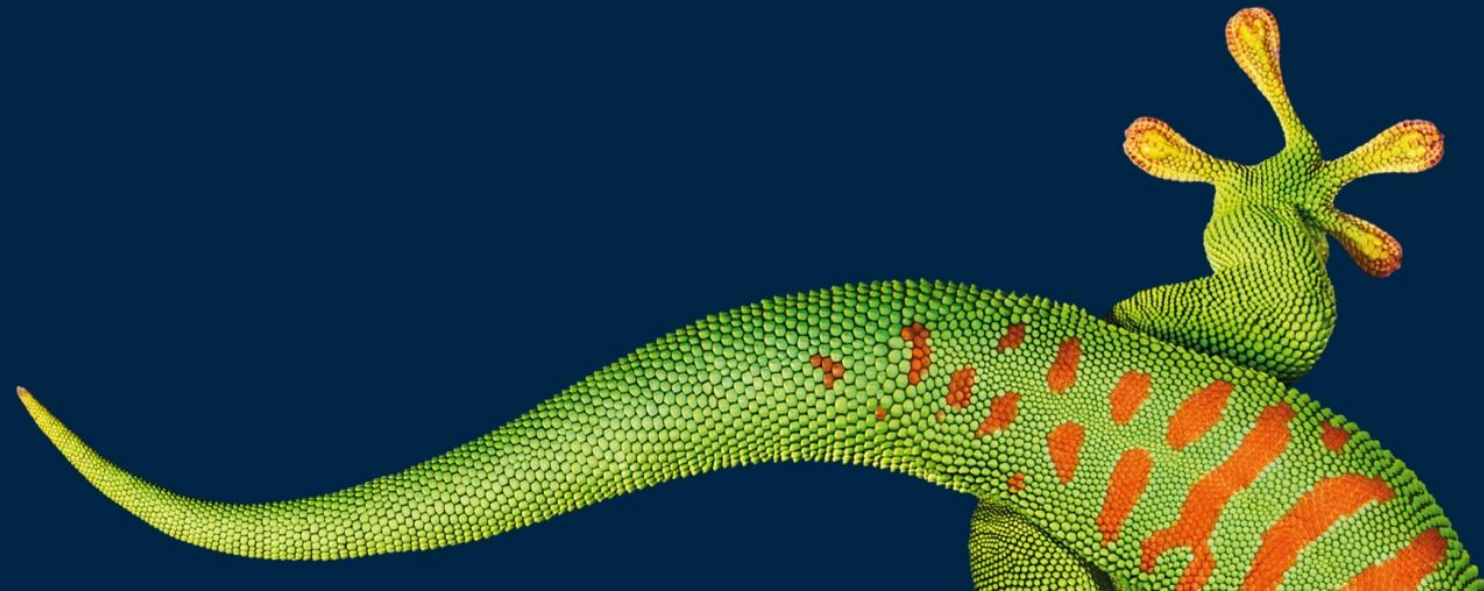
Our **smart** adhesives make our world **safer**, more **flexible, efficient** and **responsive** to the dynamic challenges of our environment.

## Our mission

Develop **innovative adhesive solutions** that make whatever is assembled, built, or constructed **smarter and more adaptive** to the forces that shape our daily lives.



# Our expertise





# + 130 years of commitment for innovation...



**1889**  
Foundation of Boston Blacking Company

**1920's**  
Expansion across 3 continents

**1960's**  
Boston Blacking Company becomes Bostik

**1990**  
Acquisition of Bostik by Total

**2013**  
Bostik globalises its brand (Logo)



**2015**  
Acquisition of Bostik by Arkema

Bostik's bolt-on acquisition program



## KEY FACTS

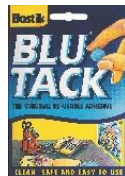
## INNOVATIONS

**1917**  
Shoes sealing and waterproof boots

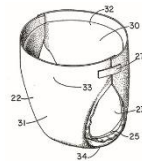
**1954**  
1<sup>st</sup> neoprene-based contact glue

**1970**  
Launch of Bostik Blu Tack®

**1951-1960**  
Sealing and bonding solutions for automotive and aircraft



**1975**  
1<sup>st</sup> elastic attachment adhesive for disposable diapers



**1986**  
1<sup>st</sup> silyl modified polymer-based elastic adhesives

**2003**  
1<sup>st</sup> patented pressure sensitive adhesive for resealable food packaging



**2019**  
Bostik launches Fix & Flash, a professional technology that bonds on demand and on any material (even opaque) thanks to its drying UV system.



# We contribute to and benefit from Arkema's know-how in Specialty Materials...



**1,600**  
researchers

**60**  
R&D  
partnerships

**222**  
patents filed  
in 2019, including  
67 % relative to  
sustainable  
development

Allocates

**2.8%**  
of Group sales  
to R&D

**15%**  
of sales are for  
products  
commercialised  
within 5 years

**46%**  
of our sales  
contribute  
significantly to  
sustainable  
development  
objectives\*

**In the top 100  
global innovators  
from 2012 to 2018**



\*On the basis of an assessment of 44% of the Group's third-party sales in 2019

# ... And are committed to the pursuit of United Nations (UN)'s Sustainable Development Goals (SDGs):



The conducting lead of Arkema Group's CSR policy

**Deliver sustainable solutions driven by innovation** 

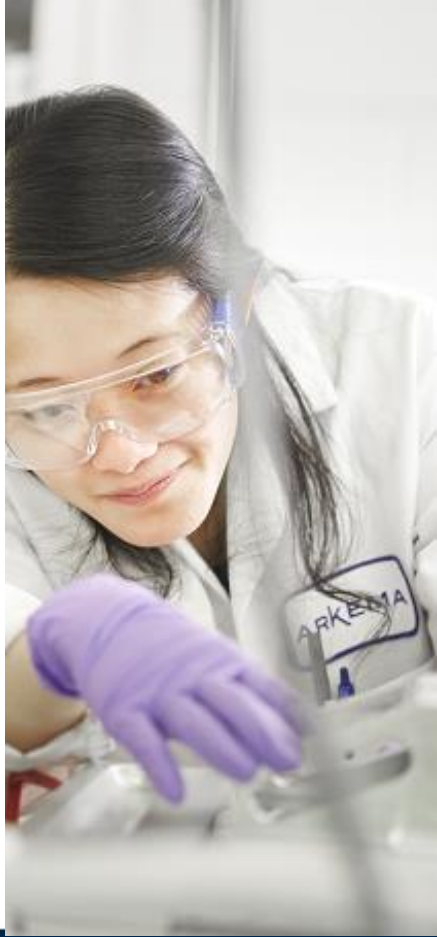
- Solutions that address societal challenges
- Innovation at the heart of the activities
- Product stewardship

**Manage our activities as a responsible manufacturer** 

- Safety of people and processes
- Health
- Reduction of the environmental footprint

**Cultivate an open dialogue and close relations with our stakeholders** 

- Ethics
- Human rights
- Diversity and employee development
- Responsible value chain
- Corporate citizenship



**How we improve**  
**people's daily lives**



# We provide adhesive solutions for multiple markets

## Construction & Consumer



WALL & FLOOR



SEALING & BONDING



CONSUMER  
(REPAIR, DECORATION  
AND STATIONERY)

## Industrial Assembly



ADVANCED PACKAGING



DURABLE GOODS

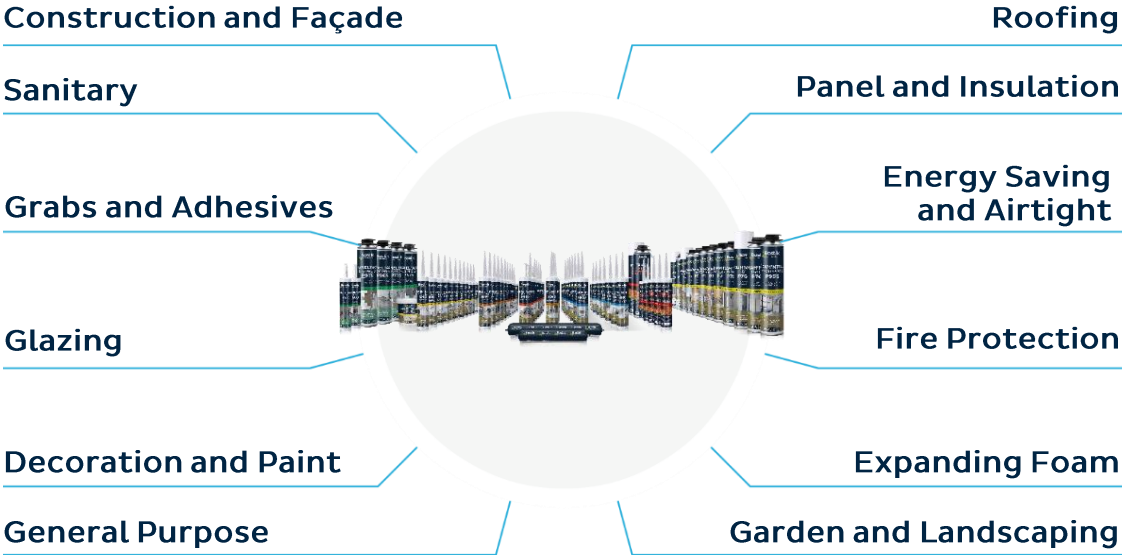


NON WOVEN



# Sealing & Bonding

A smart, complete offer of professional solutions and concepts for sustainable and efficient interior and exterior sealing and bonding jobs.



# Wall & Floor

A complete offer of professional solutions and systems for the preparation and the installation of all kinds of coverings on walls and floors.

## Tiling and masonry

Ceramic tile adhesives, wet room systems, grouts, mortars

## Wall preparation

Fillers, plasters, primers, removers, insulation

## Wall adhesives

for wallpaper, glassfiber, textile and vinyl coverings

## Floor preparation

Screeds, primers, underlayers, self-leveling compounds, damp proof membranes

## Soft floor

Adhesives and solutions for LVT, carpet, vinyl, rubber, linoleum

## Wood floor

Adhesives and solutions





# Consumer

From home improvements to repair and craft activities, we are committed to meet the everyday needs of consumers and providing products which allow them to achieve high quality results.

## Repair & Assembly

For small repairs and household projects:

*'Don't bin it, fix it!'*

## Stationery & Craft

Blu Tack®: a mainstay of our stationery and craft ranges which are used all over the world

Our consumer range is completed with extensive offers for decoration, flooring, tiling and waterproofing. Discover all our offer on our website: <https://diy.bostik.com/en-UK>

## Sealing & Bonding

Sealants and grab adhesives for fast and professional finishes in DIY applications



# Durable Goods

- Innovative solutions designed to improve production efficiencies, enhance end-use performance and reduce energy consumption,
- Flame retardant, lightweight yet durable solutions that increase occupant safety and comfort,
- First product to market that passes Miami-Dade high velocity hurricane code requirements,
- Revolutionary instant adhesives for “by-the-dot” bonding.

Aerospace  
Appliance  
Assembly  
Automotive and general transportation  
Building components and woodworking  
Composite lamination and textile  
Engineering adhesives  
Filtration



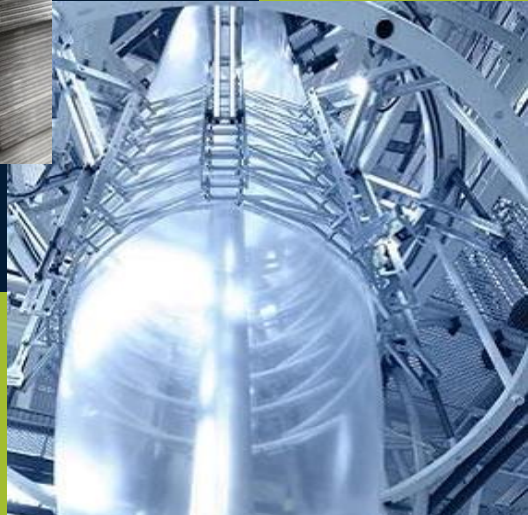


# Advanced Packaging

- Innovative solutions that reduce cost-in-use, improve sustainability and increase operational efficiencies,
- Unique, water-white adhesives that bond to difficult, highly recycled substrates and reduce SKU volume,
- First to patent extrudable, reseal adhesive technology for improved consumer convenience and reduced waste,
- Revolutionary anti-fog adhesive coatings for transparent food packaging.

## Flexible packaging

Paper, board and consumer packaging  
Tapes and labels





# Non woven

Smart adhesive solutions delivered simply, consistently, and personally, wherever you are in the world. Applying our deep understanding of the hygiene market's needs, we bring the dedicated expertise you need to create, test, and refine products that target consumer satisfaction, meet operational criteria, and ultimately add value to your business.

Baby care  
Feminine care  
Adult incontinence



# Our recent innovative solutions



## Axios™

Revolutionary hardwood adhesives based on Tri-Linking Polymer technology with sound reduction for building occupants and unlimited moisture vapour protection for all types of wood.



## Smoothing Insulation Filler

Patented solution with insulating properties that optimise interior comfort and reduces by 15% heat loss.



## Polyurethane Sealants

New generation polyurethane sealants, guaranteed bubble-free curing.



## Fix & Flash / Fix & Glue

The next generation of superglues. Our advanced 'methoxy ethyl cyanoacrylate' technology enables users to repair quickly and easily as when using traditional super glues, but in a safer way and with more reliable and long lasting results.



## Technis R

Next generation self-levelling floor screed, which is fast curing, flexible and non-shrinking.



## Purefix Grab Adhesives

Containing no phthalates or solvents which can be harmful to our health, the new Purefix range works on all materials and surfaces making it the perfect choice for indoor and outdoor bonding applications.

# Our recent innovative solutions



## Born2Bond™

MECA-based instant engineering adhesives with a patented low-odour formulations, which enable a more comfortable manufacturing environment, and low-bloom solutions, suitable for use in mass production in selected industries.



## New Compostable Hot Melt Adhesive

Bostik is the leading supplier of Hot Melt compostable adhesives for insulated paper cups. Approved by the Biodegradable Products Institute (BPI).



## Kizen®

Next generation Hot Melt adhesive for case and carton sealing. Enables production efficiencies through waste elimination, coating weight reduction and fast setting speeds.



## SAF Structural Adhesives

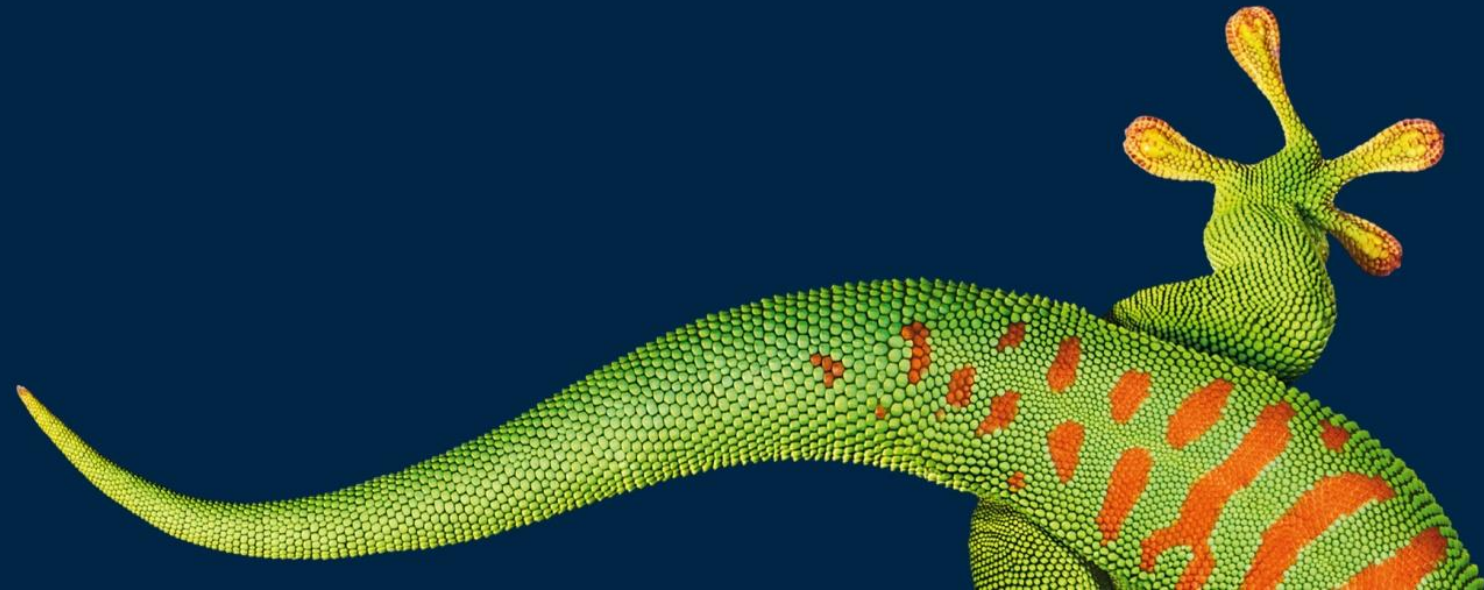
Patented adhesives with high resistance and durability when bonding composites and other materials.



## Brilliance™

The world's first, high-performance olefin elastic attachment adhesive. This patented formulation removes the dilemma of having to choose between premium performance and maximum operational efficiencies by eliminating many of the process challenges that your business faces daily.

Our **pride**





# Our expertise is recognised by our customers all over the world



**2020 « Best of Innovation » for BAM™**  
**International Surface Event (TISE)**

**Fix & Flash: Product of the Year 2019 in France**  
*(Fix & Flash: Élu produit de l'année 2019)*

**2018 Innovation Award for Brilliance™**  
**Adhesives and Sealants Council (ASC)**

**Performance Excellence Award**  
**Boeing**

**Frost and Sullivan Automotive Award**

**Supplier Innovation Award**  
**American Packaging Corporation**

**Environment Award in France**  
*(Trophée de l'Environnement)*  
**Legallais Group**



# We use all available means to connect with our customers



**Industry  
Events  
& Seminars**



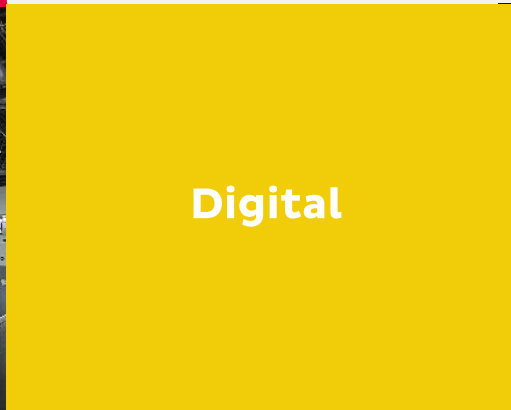
**In Store**



**Sponsorship**



**Digital**



**Technical  
Training  
& Support**

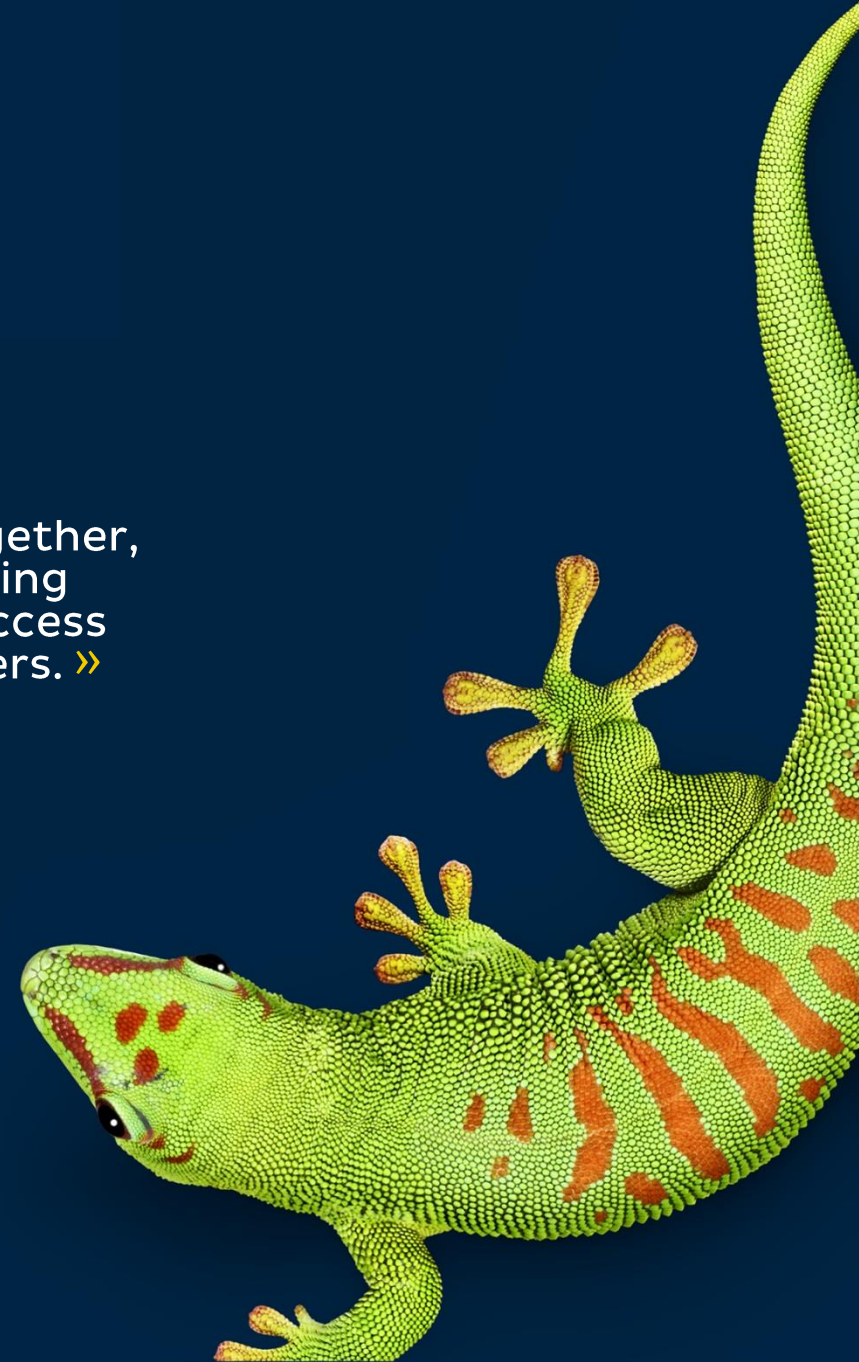




Much more than sticking things together, we develop smart bonding and sealing solutions that contribute to the success and the satisfaction of our customers. »

**VINCENT LEGROS**

Bostik Chairman & Chief Executive Officer





**#WeAreBostik**