



MOBILITY

Accelerating industry transformation

Henkel Investor & Analyst Day 2019

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Alternative Energy Vehicles

Autonomous Driving

Lightweight

Mobility

Alternative Energy Vehicles

- 250 new electric car model launches in the next 2 years
- Global electric car volumes growing at 25% CAGR (2019-2024)*
- Significant market opportunity for new applications on batteries & e-motors

Mobility

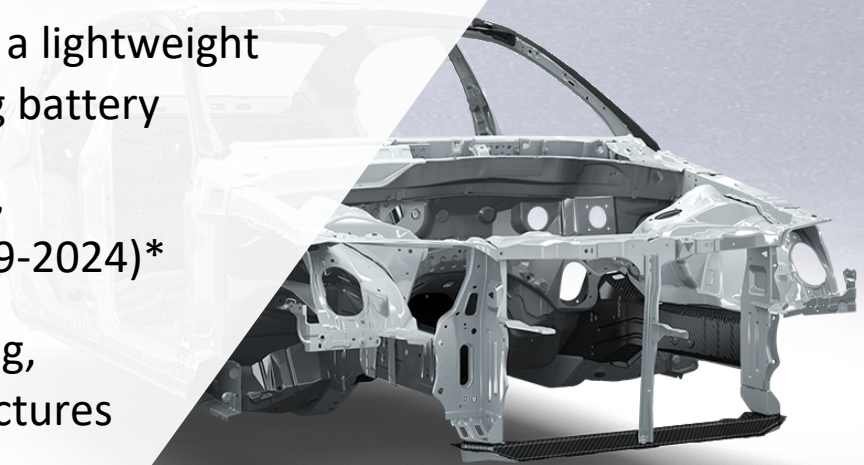
Autonomous Driving

- Safety, comfort and connectivity is driving more electronic components and sensors per car
- Global sensor volumes growing at 8% CAGR (2019-2024)*
- Significant market opportunity for protection against fluids, moisture and vibration

Mobility

Lightweight

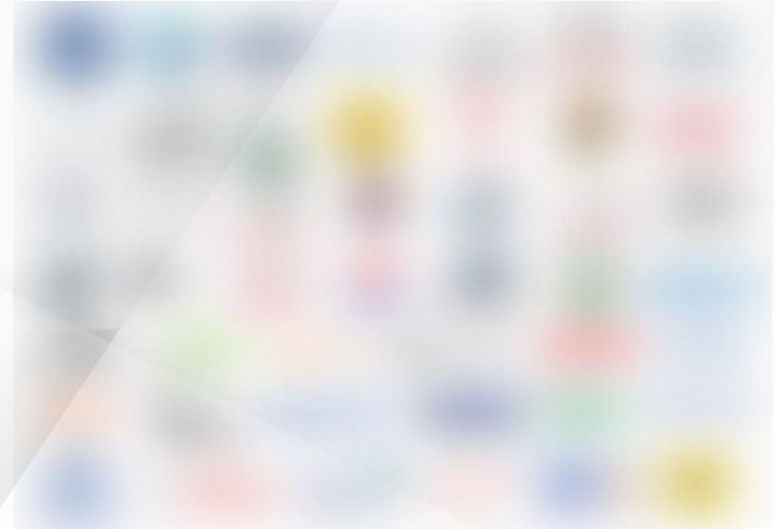
- An electric car body and chassis requires a lightweight structure to support an additional 600 kg battery
- Increased usage of lightweight materials, e.g. aluminum growing at 9% CAGR (2019-2024)*
- Significant market opportunity for coating, bonding and reinforcing lightweight structures



Our leading position

Trusted partner of OEMs and Tier 1&2 suppliers

- Unmatched breadth of technology & solutions portfolio
- Strong relationship with leading OEMs and Tier 1&2 suppliers
- >1,000 customer-facing technical sales engineers



> Enabling our customers to win their future markets

Our global technical competence

Footprint and know-how

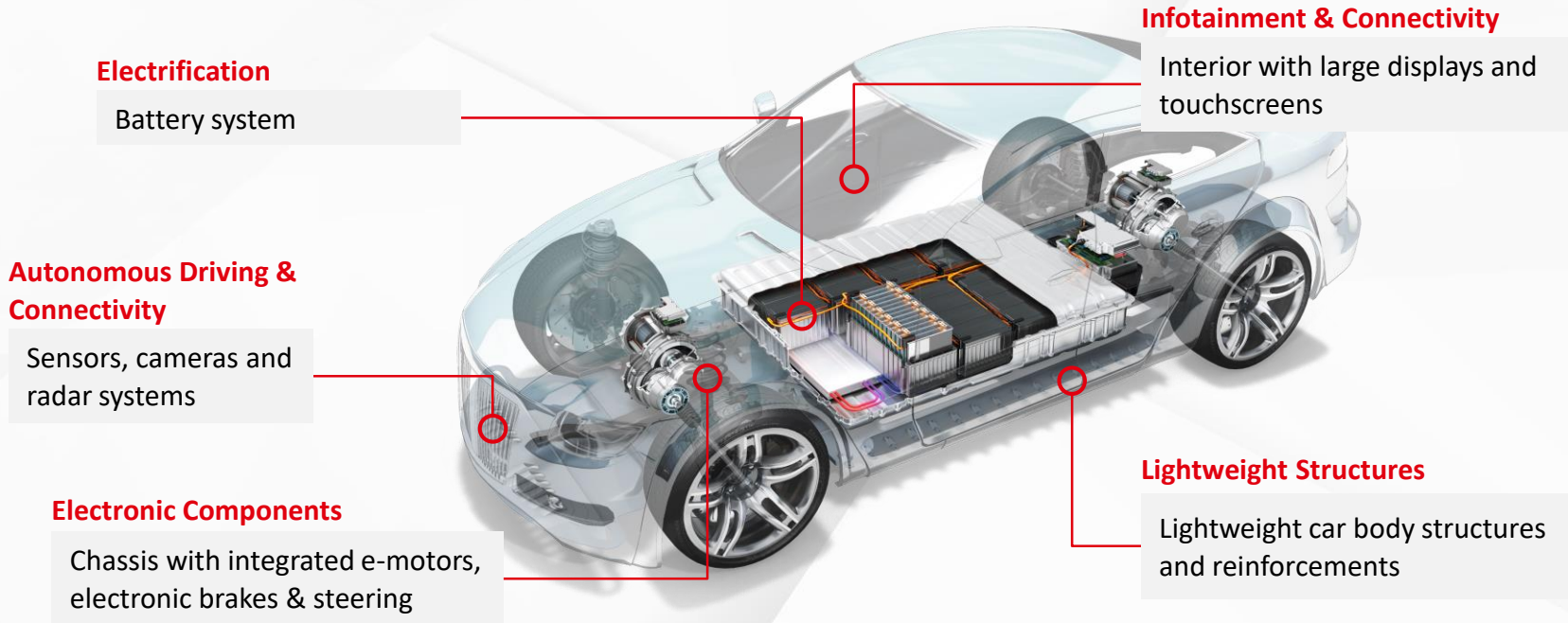
- 9 world-class application centers at major industry hubs
- Resident engineers based at major customer design centers
- >300 technical experts in global application & development teams



» Driving global innovations transforming the industry

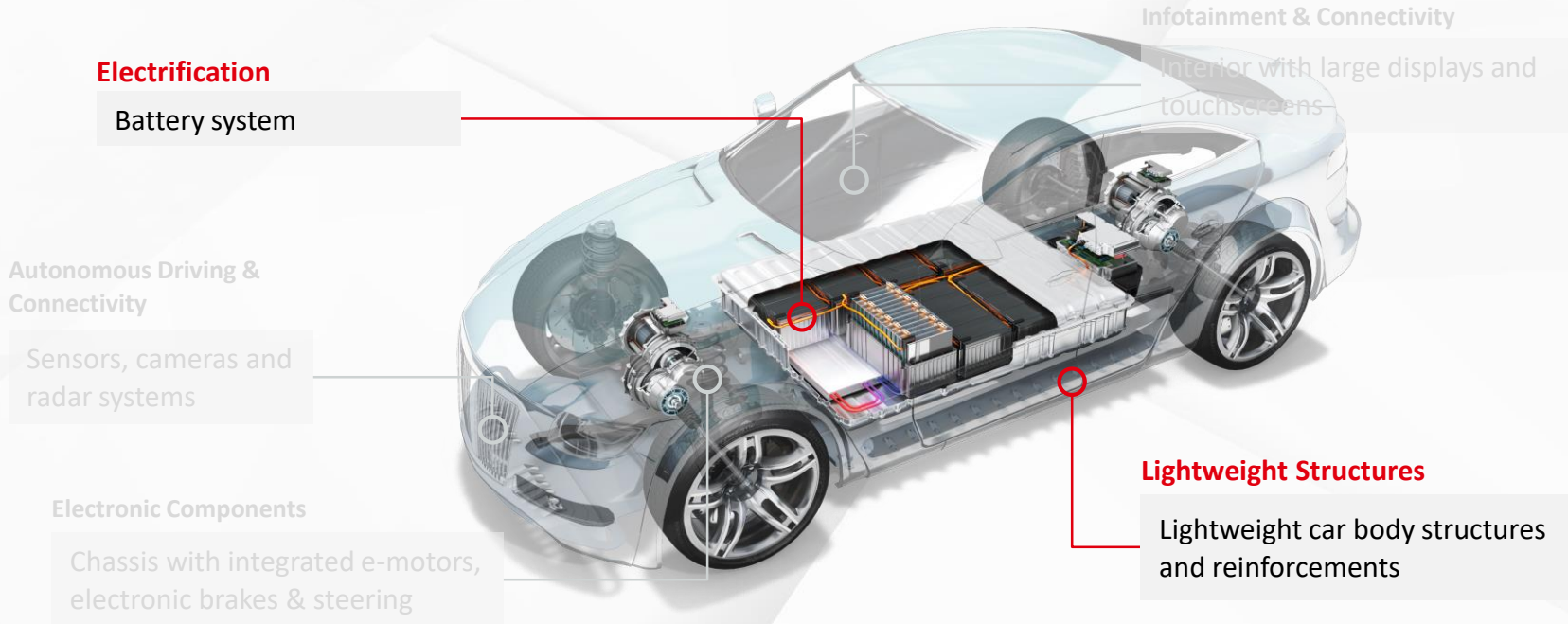
How Henkel is shaping the future car

Electrification and new designs require new technology solutions



How Henkel is shaping the future car

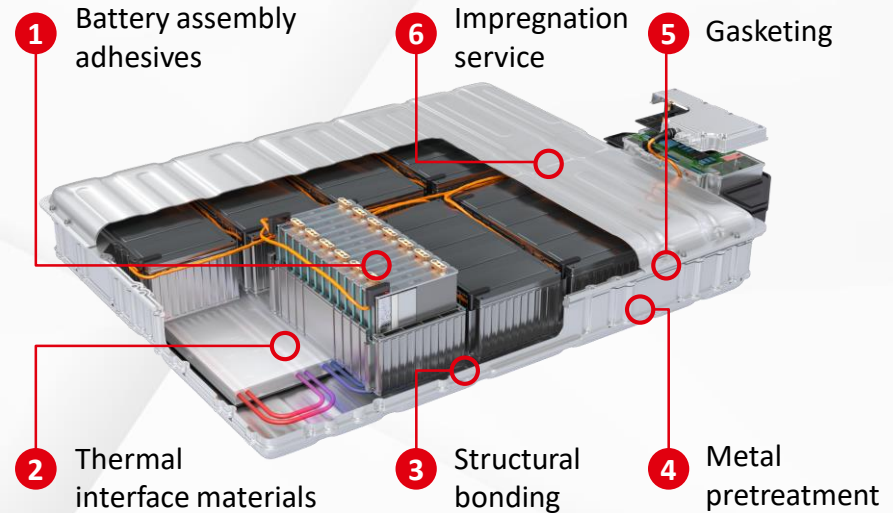
Electrification and new designs require new technology solutions



Shaping new battery designs

Broad technology know-how as competitive advantage

- Reliable thermal management with our **Thermal Interface Materials**
- Efficient large-scale assembly of battery modules with our **Adhesives**
- Protection against fluid, dust and corrosion of battery housings with our **Sealants** and **Functional Coatings**

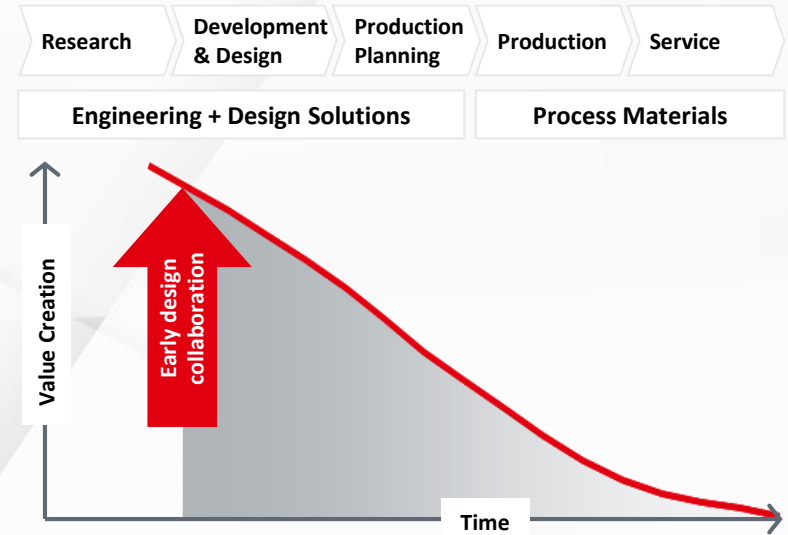


➤ **Unique material and application expertise for battery safety and performance**

Enabling designs for lightweight body structures

Engineering Alliance as competitive advantage

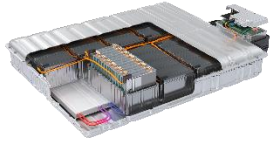
- Access to **2,000 engineers** combining engineering and material science
- Direct **design collaboration** with OEM design centers in early development phase
- Project pilot: Reduction of approx. 40 kg of total car body weight with **structural reinforcements** and **adhesives**



➤ Transform material science to full engineering solutions

High-impact solutions

Engineering, process and material know-how driving future growth



European OEM:

Battery module assembly

Thermal interface materials and adhesives

- Start of production 2020
- 7 years production time
- 100% incremental sales



European Tier 1 Supplier:

Infotainment display

Optical performance & structural adhesives

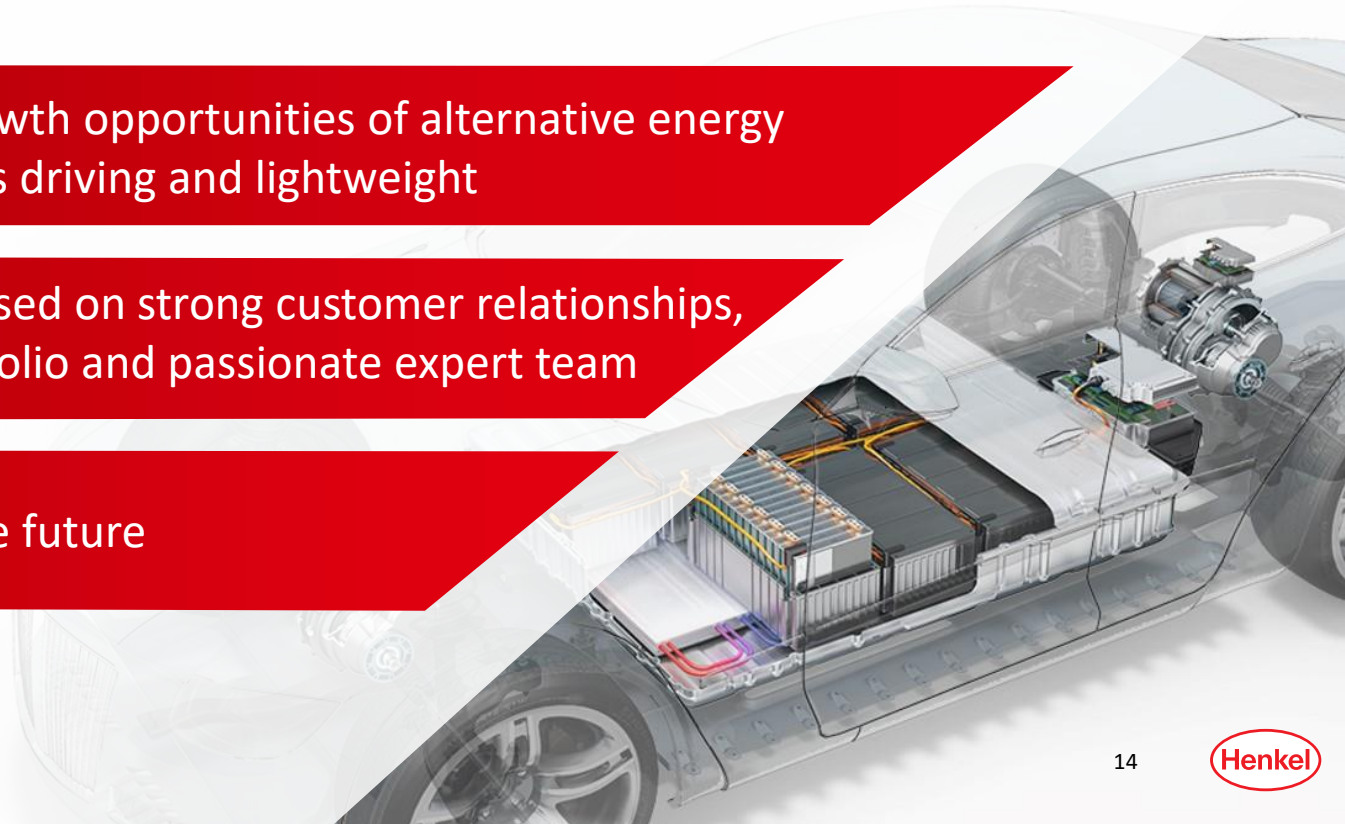
- Start of production 2019
- 7 years production time
- 100% incremental sales

Key take-aways

Capturing unique growth opportunities of alternative energy vehicles, autonomous driving and lightweight

High ability to win based on strong customer relationships, unique solution portfolio and passionate expert team

Shaping the car of the future



Thank you

