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

*Source: IHS 01-2019
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

*Source: BIS Research, Grand View Research, Accuracy Research, Henkel
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.

*Source: Ducker Worldwide, 2018
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

**Electrification**
- Battery system

**Electronic Components**
- Chassis with integrated e-motors, electronic brakes & steering

**Autonomous Driving & Connectivity**
- Sensors, cameras and radar systems

**Lightweight Structures**
- Lightweight car body structures and reinforcements

**Infotainment & Connectivity**
- Interior with large displays and touchscreens
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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