2018 PPG Overview:
We Protect and Beautify the World
About us: 44,000 employees protecting and beautifying our world

A global maker of paints, coatings, and specialty materials

A leader in all our markets: construction, consumer products, industrial and transportation markets and aftermarkets.

Headquartered in Pittsburgh, Pennsylvania, with operations in more than 70 countries.

Founded in 1883

Fortune 500: Ranked 183
Our sales reflect global breadth

Global expansion delivers a more balanced paints and coatings portfolio

2005 - $10.2 B
72%
20%
6%
2%

2017 - $14.8 B
43%
30%
17%
10%

Net Sales*

- U.S. & Canada
- EMEA
- Asia/Pacific
- Latin America

* 2005 – as originally reported, not adjusted for divestitures; 2016 – Sales from Continuing Operations
Our portfolio transformation

2005 – $10.2 B

- Paint and Coatings: 55%
- Chemicals: 23%
- Glass: 22%

Paints and Coatings = $5.6B

2017 – $14.8 B

100%

Paints and Coatings = $14.8B

* From continuing operations – as originally reported
Two product segments drive our business

Performance Coatings
- Aerospace
- Architectural Coatings – Americas & Asia Pacific
- Architectural Coatings – EMEA (Europe, Middle East, Africa)
- Automotive Refinish Coatings
- Protective & Marine Coatings

Industrial Coatings
- Automotive OEM Coatings
- Industrial Coatings
- Packaging Coatings
- Specialty Coatings & Materials
- Coatings Services
We remain focused on maintaining industry-leading standards with regards to environment, health and safety

We are committed to:

• Designing, building and operating its facilities in ways that:
  • prevent harm to public health and the environment;
  • conserve energy, water and raw materials;
  • integrate pollution prevention; and
  • make a positive contribution to the surrounding community and society.

• Operating safe workplaces, and manufacturing, selling and distributing products in a manner that is safe and healthful for its employees, neighbors and customers, and that protects the environment.

• Implementing global processes to track new regulations and emerging issues.

• Implementing initiatives to improve employee safety, health and well-being, reducing the PPG injury-and-illness rate.
Our goal: everybody goes home safe each and every day

From 2003 to 2017, we reduced our injury and illness rate by 75%

### PPG Injury and Illness Rate
Incidents per 100 workers

<table>
<thead>
<tr>
<th>Year</th>
<th>Rate</th>
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<tbody>
<tr>
<td>2003</td>
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<tr>
<td>2004</td>
<td>0.96</td>
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<td>2016</td>
<td>0.31</td>
</tr>
<tr>
<td>2017</td>
<td>0.29</td>
</tr>
</tbody>
</table>

We estimate that, based on improvements from the 2003 baseline, our risk-reduction efforts have prevented nearly 4,900 PPG injury-and-illness cases globally.
Everything we do revolves around sustainability

PPG Sustainability Vision
We are committed to delivering lasting value for shareholders and customers by operating with integrity, working safely, respecting the contributions of our people, preserving the environment and supporting the communities where we operate.
Sustainability Values

1. Operate safe, healthful workplaces that value diversity, promote teamwork and reward performance
2. Conduct business and operations in an ethical and compliant manner
3. Minimize the impact of our operations on the environment
4. Deliver inventive products and solutions that help our customers maximize the performance of their assets, minimize environmental impact and preserve and protect the environment
5. Partner with suppliers and customers to create value
6. Deliver positive change in the communities where we operate
7. Deliver a superior return on investment to our shareholders
Awards and recognitions

Indexes and Rankings
• Fortune’s World’s Most Admired Companies
• U.S. 500 in the Newsweek Green Ranking
• Forbes’ World’s Best Employers 2017
• Forbes’ America’s Best Employers 2017

Corporate Social Responsibility Awards
• Human Rights Campaign 2018 Corporate Equality Index
• Forbes’ Best Employers for Diversity

Product and Process Awards
• 2017 R&D 100 Awards (PPG Premium Compact Process Primer and Liquid Nails Fuze*It construction adhesive)
• 2017 Safran Innovation Award (AEROCRON™ electrocoat aerospace primer

Customer Awards
• John Deere Supplier Innovation Award
• Airbus Best Performer Award
High ethical standards are vital in our culture

• Believing that excellence in business and high ethical standards go hand in hand, we are committed to:
  • Furnishing goods and services that meet our customers' and society's needs;
  • Providing employees with a safe, healthy and fulfilling work environment;
  • Providing our shareholders a superior return on investment; and
  • Contributing as a good corporate citizen to each nation and community in which we operate.

• We conduct annual online ethics training and certification, and provides a Global Ethics Hotline for employees

• For more details, visit the PPG Global Code of Ethics website at:
PPG Together
Bringing our best together to protect and beautify the world

- PPG is an extremely diverse company with a global portfolio of businesses and product lines
- More than 150 manufacturing facilities and equity affiliates
- Operations in more than 70 countries
- Approximately 44,000 employees of wide-ranging nationalities, cultures, religions, ethnic, professional and educational backgrounds
Diversity as a competitive advantage

• Our vision is to become a stronger, more competitive company by fostering a climate that recognizes the business value of an engaged work force.

• We've developed metrics that enable us to build a global work force with careful attention to gender and diversity components, retention of employees and talent management.

• PPG is committed to being employer of choice. We hire on the basis of individual qualifications and ability relative to job requirements.

Click here for video
Reaching Out to Our Communities
COLORFUL COMMUNITIES™ Program

Goal is to enhance, protect and beautify neighborhoods in the communities where we operate

- Series of charitable projects in our communities
- Projects incorporate our products, employee volunteers and financial contributions
- Completed in partnership with non-profit organizations or government entities
- Strong communications to raise visibility of our projects and brand
- Involves thousands of PPG employee volunteers

Click here for video
More than 2.0 million people have been positively impacted

88 projects in 20 countries
(Australia, Brazil, Canada, China, Colombia, Czech Republic, Denmark, France, Hungary, India, Italy, Korea, Mexico, Netherlands, New Zealand, Poland, Russia, Turkey, United Kingdom, United States)

4,725 volunteers dedicated more than 24,648 volunteer hours to brightening communities through painting, planting, cleaning, educating, and more

More than $2,063,653 in PPG funding to support Colorful Communities projects

11,415 gallons of PPG paint product utilized (43,210 liters)

More than 2.0 million individuals positively impacted by our Colorful Communities projects

Over 536 local media clips that covered Colorful Communities projects
PPG Refinish
Our brands

• Within the refinish market, PPG Refinish offers a comprehensive range of premium and innovative products, a market leading colour offer and a broad range of services through its three brands out of which PPG Refinish brand is approved by Mercedes Benz:

• **PPG Refinish Colour** Offer Quite simply the most accurate, effective and easy to use colour systems on the market.

• From colour identification via a Spectrophotometer or a Chipped Variant Deck, through to colour retrieval via a state of the art touch screen balance and bar code reader, no other system can match our level of colour accuracy.
Refinish Proposition
Our Mission

To improve the profitability of our customers by delivering:

- Analysis on the performance of paint shops
- Productive & Innovative products and processes
- The most accurate and easy to use colour tools
- Value Added Services to optimise performance
Bodyshop Business Cycle
Efficiency & Profitability

Development

EFFICIENCY & PROFITABILITY

Control

Management Training
Customer satisfaction surveys
SMART Repair concept
Marketing for bodyshops

Lean for Collision Methodology
Green Belt Training
Bodyshop Layout Design
Technical Audit

Paint Manager
Stock management
Benchmark Report
Financial Report
CSI/ESI

MVP BUSINESS SOLUTIONS
Bodyshop Business Cycle
Efficiency & Profitability

Development → EFFICIENCY & PROFITABILITY ← Control

- Management Training
- Customer satisfaction surveys
- SMART Repair concept
- Marketing for bodyshops

Paint Manager
Stock management
Benchmark Report
Financial Report

This is the area of PPG’s Core Competence
Bodyshop Business Cycle
How to improve Efficiency and Profitability

- Reduce the cost per job to maximise bodyshop efficiency
- Increase through-put to increase bodyshop sales and profitability
Change-Management
Because Change is not easy

BMS / IT Tools
MVP Benchmark Report

Our Expert Team
You assisted by our Expert Team

MEASURE

BODYSHOP AUDIT & BENCHMARK

Our
- Products
- Processes
- Colour
- Expert Team

RE-MEASURE

IDENTIFY IMPROVEMENTS

CONTROL

IMPLEMENT

MVP BUSINESS SOLUTIONS
Achieve Your Goals with MVP

BE + ATTRACTION

BE + PROFITABLE

BE + PRODUCTIVE
The Optimum Technical Process
Product Offer
Speed is the Key

All of our products are developed with the full process in mind.

They are designed to speed up the painting process and to compliment each other as part of a system.

They are also designed to offer energy savings as well as the highest quality of finish.

They are simple to use, to allow technicians of all skills levels to get the most from them.
Priming Systems

Spectral Grey System
• Simple to use
• Maximizes covering power of your topcoats

Self Levelling Primer
• A totally non sanding system (no need to sand e-coat or the primer)
• The best appearance possible from a non sanded primer

Flattable Primers
• Optimal build and flatting properties
• Roller application possible

UV Primer
• High build with 2 minutes drying time
• Ideal for SMART repairs
The Worlds most advanced Basecoat Technology

- **Superb colour matching** – Consistent colour, faster process to ID colour and obtain correct match
- **Easy to fade out** – faster finishing time and material savings
- **High opacity tinters enable optimum coverage** – time and material savings
- **Fast process and drying times** – increase efficiency and improved through-put
Clearcoats

Our latest Clearcoat innovation is the HS+ All In One Clear

• 10 minute bake times to reduce energy costs and increase through-put
• One visit applications to improve process times
• Great Gloss and Hold-out
• Superb early hardness
• Scratch resistant finish
Process Optimisation

All products are designed with the process in mind.

We offer process options to save Labour times & Booth times, thus reducing costs and maximising through-put.

We also offer processes that are simple to learn, which means even less skilled staff can get the best out of our offer.
Process Optimisation

- **Optimal Fade-Out Process**
  - No additives, blend in layers or extra steps

- **Cut Out Process Steps**
  - Self Levelling Primer - WOW process with optimum appearance & no need to flat the e-coat

- **Efficient Use Of Spray booths**
  - Express Clearcoat drying modes
  - Engine Bay Repair – Cut out process steps and match the OE finish
  - UV Primer – Slash drying time on small jobs
  - Roll Primer – Move priming jobs out of the booth
Technical Expertise

• **Largest Technical Team in the European Refinish industry** – provide regular and consistent support to get the best from our products and your staff

• **All Technicians are accredited to senior level** – proactive in delivering best practices to help your Bodyshop be efficient and profitable
Our Training Center is Europe

- Over 25,000 people globally are trained by PPG Group trainers each year, with up to 10,000 trained at European locations
- 22 Training Centres available in all major territories in Europe
- On site training to help you achieve optimum repair process performance from our refinish products
- At the same time the PPG field based teams in each country are able to provide the highest standard of support and expert technical advice
Colour Tools
Digital Colour Chips Onscreen

A new patented colour search-and-retrieval tool that provides a visual representation of the exterior vehicle body colour and compatible “non-body” colours in a web application.

Any combination of search criteria can be deployed by the user to find the make, model, and year of a particular vehicle.

Complements the current PPG Colour Information Books and will allow greater search capability and flexibility during colour selection.
Waterborne Coatings System

- Help collision repair shops reduce the amount of volatile organic compounds they release into the air
- Eliminate the need for expensive stirring equipment and enhance colour-matching capability
- Customer benefits include low-VOC emissions, better colour-matching, eliminates expensive stirring equipment
Colour Tools

- Sprayed out Variant Chips
- RAPIDMATCH™ X-5 spectrophotometer
- PAINTMANAGER® program software for mixing and managing the paint operation
- TOUCHMIX® computerised paint mixing systems
- COLORMOBILE® computer software
Waterborne Variant Decks
What you see is what you get

- Contain variant chips all sprayed with PPG WB basecoats – accurate reproduction
- Production is carried out using our recommended spraying technique – consistent results
- Replicated in the bodyshop results in consistency between colour chip and colour formula – right first time
- Chips are bar-coded to provide fast access to on screen mixing information – speeds up process
PaintManager® program software
Mixing and colour retrieval

PaintManager program software & TOUCHMIX® computerised paint mixing systems

• The Fastest colour retrieval system on the market
• Run the bar-code reader over the chosen chip and get straight to the colour formula
• No human error possible
• Touch screen technology
  - No mouse or keyboard
PaintManager® program software
Reporting & Cost Control

- Provides all in one mixing and reporting facility
- Via *PaintManager* program a number of reports are available to help you manage your paint use:
  - Product mixed inventory
  - Paint usage by operative
  - Stock management
  - Ordering management
Mixing and Colour Retrieval
Colour Online

• 24/7 on line colour information – no waiting for office hours colour search
• Instant access to colour database of more than 350,000 formulations – huge choice to find solution
• Global database updated by our colour labs around the world – large choice of most recent formulations
RapidMatch™ X-5
Spectrophotometer and formula retrieval software

*RapidMatch x-5* spectrophotometer is an innovative new way of helping a painter in a bodyshop quickly identify the best color formula available to give an accurate match to the vehicle being repaired.

The painter first uses a state-of-the-art five-angle spectrophotometer to “read” the color on the car. Using a PPG proprietary algorithm, the software then compares the color to all the Primes, Variants, and Specials stored in a database of formulas for the paint system and rates the accuracy of each potential match.
RapidMatch™ X-5
Paint colour matching system

Measures colour from five reflective angles – increased accuracy

- Easy to use with click and go at the press of a button – **simple and quick to save time**
- Finds most likely variant available in seconds – **increased productivity**
- Light weight and portable – **Flexible use in and out of shop saves time**
- Easy access to field formulations and specials – **saves time on colour matching**
TouchMix® mixing system

The TouchMix computerised paint mixing system uses the latest touchscreen electronic component technology. This market leading product will enable distributors and bodyshops to meet the highest demands of the repair industry.

This unique touch device improves work flow, leaves less room for error, reduces paint waste, provides more connectivity options to suit all bodyshop operations, is more robust, and is fully compliant to European Standards (ATEX (II 3 G EEx nA nL [nL] IIB T4)).
ColorMobile® computer software

*ColorMobile* software application is a versatile tool which has been designed to work seamlessly across an array of smartphones and tablet devices. It has been designed with industry professionals in mind. The visual interface is simple to navigate and formula results are now easier to view.

With the *ColorMobile* software application, experience the freedom of retrieving the most up-to-date of colour formulations for all Motor Manufacturers: anywhere and anytime.
Summary

PPG is the best partner to achieve this because

- We have market leading paint & colour technologies
- We offer tailored solutions for your shops
  - We have a “G-local” approach
  - Global resources in development
  - Local resources for implementation
- We have the largest and most technically skilled field forces

Get things right first time, using the shortest process is the way to improve profitability
We protect and beautify the world™