



CORPORATE PRESENTATION PAM





SAINT-GOBAIN GROUP





SAINT-GOBAIN GROUP A STRONG GLOBAL GROUP

Saint-Gobain PAM and the Pipe Activity are part of the BU:
Saint-Gobain Construction Specialities

More than

167,000

employees and over
100 nationalities represented

Around

1 000

manufacturing facilities
worldwide, operations in

70 countries

About

4,000

sales outlets



One of top 100 **most innovative** groups in the world for the last 9 years



Commitment:
carbon neutrality in 2050



European or World leadership positions in most of our businesses

Founded over

350 YEARS
AGO

2020 TURNOVER

€38.1BN

€2.9BN

2020 Operating income

OUR PURPOSE

**MAKING
THE
WORLD
A BETTER
HOME**

Act every day to make the world
a more beautiful and
sustainable common home.

PAM
SAINT-GOBAIN

(1) Net income (Group share) from continuing operations excluding capital gains or losses on disposals, asset impairments and significant non-recurring provisions



THE PAM BRAND





PAM BRAND

MORE THAN 160 YEARS OF CONSTANT INNOVATION

1856



Creation of Pont-à-Mousson plant

1866



Production of first cast iron pipe

1870



First exportations

1927



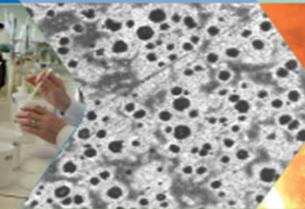
Acquisition of centrifugation process licence

1933



Creation of Research and Development Centre

1950



Licence agreement for ductile iron

1970



Industrialisation of ductile iron

1972



Start-up of large diameters machine

1980



Worldwide expansion of the Pipe Activity

2001



Launch of worldwide brand

2002



Development of Products Innovation policy

2008



Integration of sustainable development issues

2011



Brand endorsement

2020



over 160 years of innovation





PAM BRAND AT A GLANCE

THE PIPE ACTIVITY OFFERS COMPLETE SOLUTIONS DEDICATED TO DRINKING WATER, WASTEWATER, MUNICIPAL CASTINGS AND SOIL AND DRAIN MARKETS



Global actor in ductile iron pipes
Worldwide Industrial Presence

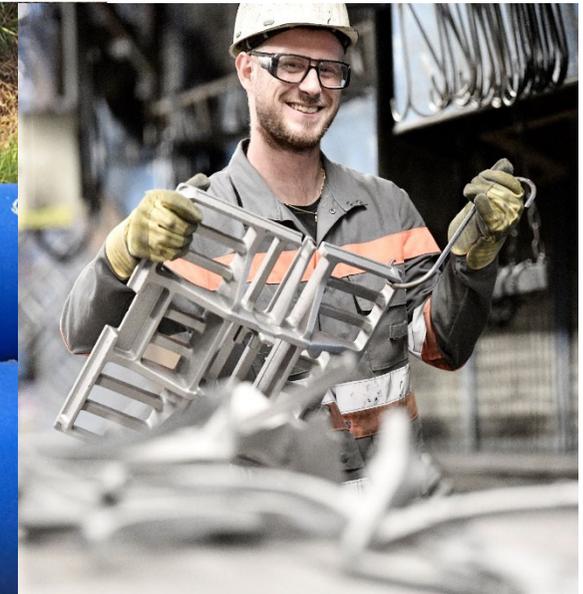


Around **5,300** employees



Intervention in **136** countries
780 878* tons of pipes
Sold in 2020

Design products and services that preserve water quality and the environment to ensure sustainable access to the water cycle for all people for the well-being of future generations



* Figures impacted in the first half of 2020 by the Covid crisis





PAM BRAND OUR MARKETS

Saint-Gobain PAM Canalisation

Water & Sewage

- ❖ Water conveyance markets
- ❖ Sewage markets
- ❖ Industrials markets
- ❖ Private markets (mining, hydroelectric, snow culture and fire networks)

Municipal Castings

- ❖ Access to sewage networks
- ❖ Rainwater absorption system
- ❖ Access to Telecom networks



Saint-Gobain PAM Soil & Drain

Soil & Drain

- ❖ Evacuation of waste and rain water





PAMP BRAND FIGURES

14 plants
in 8 countries



Turnover
More than 1 billion €

15 commercial
subsidiaries



Industrial
investments
37 M€

About 5 300 employees



Operating in 136 countries
14 400 km of pipes sold in 2020*

* Figures impacted in the first half of 2020 by the Covid crisis

PAM
SAINT-GOBAIN



A WORLDWIDE PRODUCTION INDUSTRIAL PRESENCE ON THREE CONTINENTS





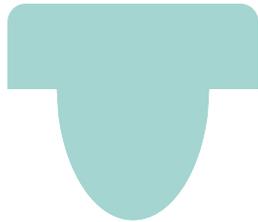
PIPE ACTIVITY

A WORLDWIDE PRESENCE CLOSE TO OUR CUSTOMERS



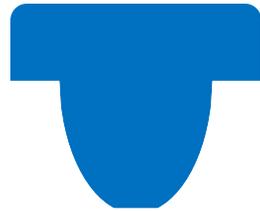


PAM BRAND ORGANIZATION : 4 BUSINESS UNITS



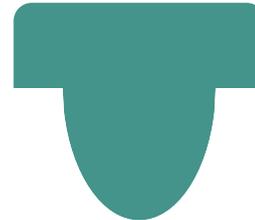
PIPE LATIN AMERICA

**Industrial
Locations**
Brazil



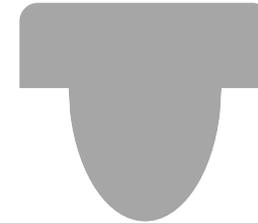
PIPE EUROPE

**Industrial
Locations**
Czec Republic
France
Germany
Italy
Spain
UK



PIPE ASIA PACIFIC

**Commercial &
Industrial
Partnership (JV)**
China



PIPE SOIL & DRAIN WORLDWIDE

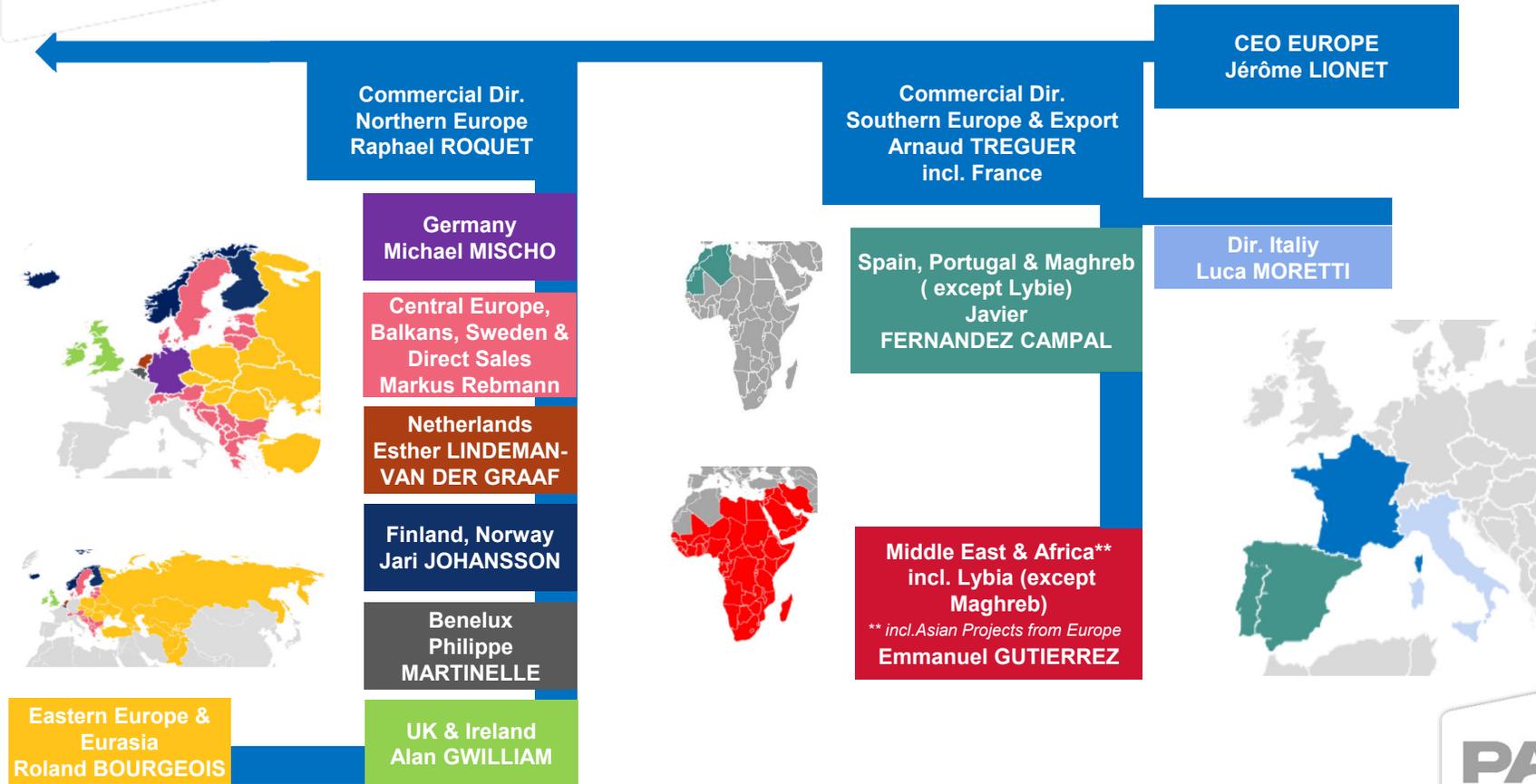
**Industrial
Locations**
France
UK





PIPE ACTIVITY

COMMERCIAL DIRECTION CANA EUROPE





PIPE ACTIVITY

COMMERCIAL DIRECTION CANA LATIN AMERICA



DG Latin America
Gustavo SIQUEIRA

Southern America
Carlos LOPEZ

Brazil
Pedro Henrique
Taves

Latin America
Mario ALVAREZ





PIPE ACTIVITY ASIA PACIFIC (JOINT VENTURE)



**CEO Asia Pacific
Clare SHI**

**Sales Manager
Hudson LI**

**International Sourcing
Manager
Stephen CHEN**

**Supply Chain Manager
Rose ZHANG**

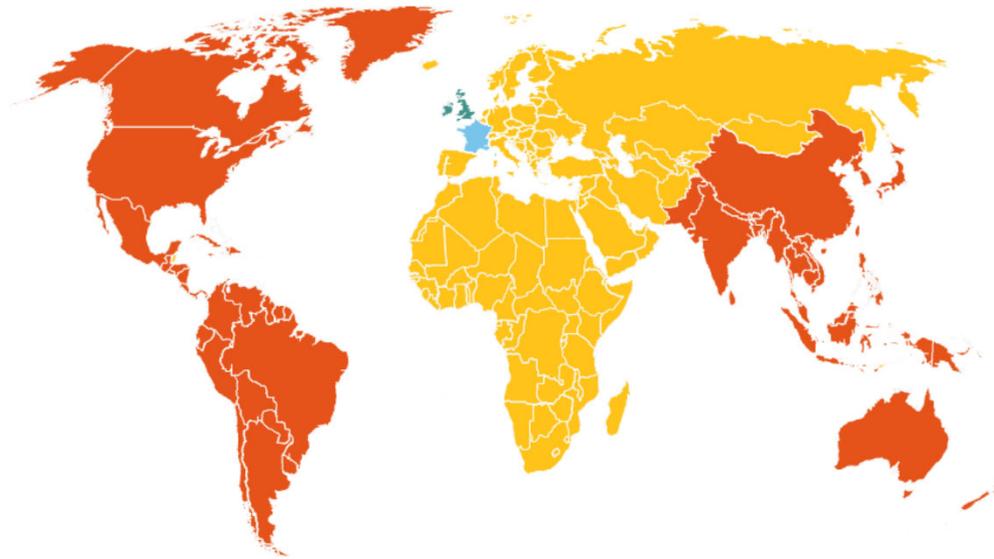
**Financial Director
Ge BIN**





SOIL AND DRAIN ACTIVITY

SOIL AND DRAIN DIRECTION





CODIR MARQUE PAM



Thierry FOURNIER
CEO South Europe &
MOA



Jérôme LIONET
CEO Pipe and Soil
& Drain Activities



Arnaud TREGUER
Commercial Dir.
Southern Europe / Export



Raphael ROQUET
Commercial Dir.
Northern Europe



Gustavo SIQUEIRA
CEO Latin America



Eric ESCALETES
CEO BU Soil & Drain
Activity



Hubert LEROY
HRD



Christophe REGNAULT
Dir. Industrial Europe
& EQHS



Antoine GRILLARD
Dir. Supply Chain &
Customer Service
EMEA



Jean-Michel EUDIER
Dir. Finance, IT,
Purchasing

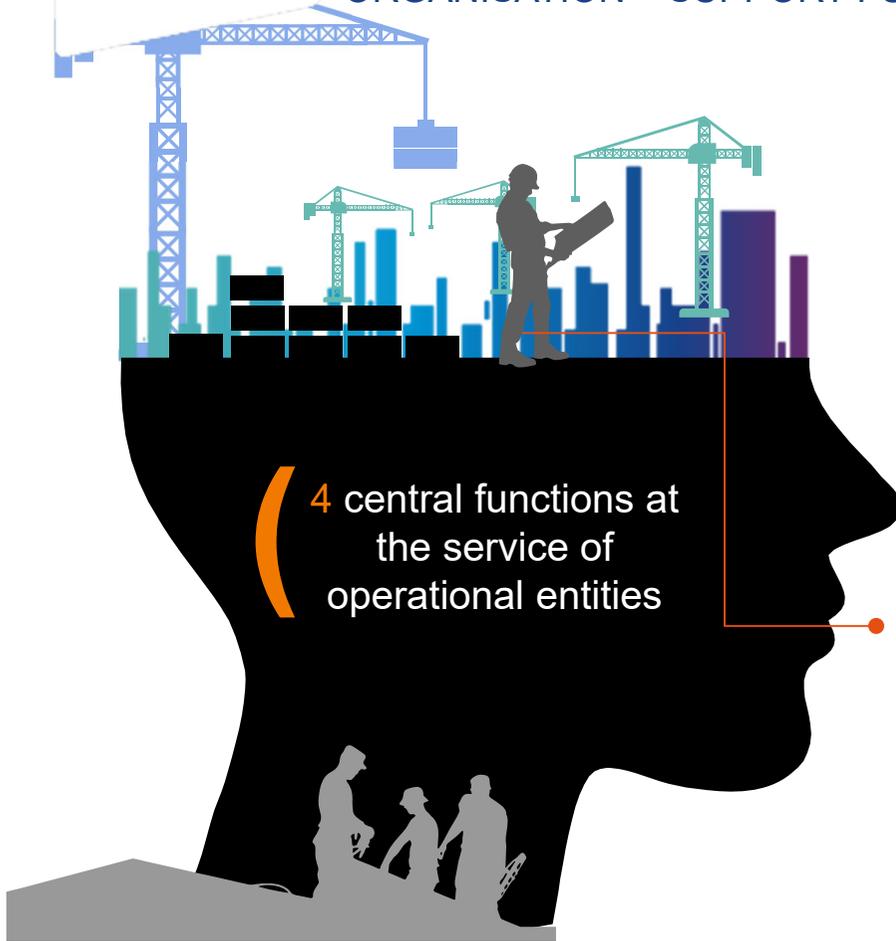


Xavier DUBERNAT
Dir. Marketing





PIPE ACTIVITY ORGANISATION – SUPPORT FUNCTIONS



4 central functions at the service of operational entities



INDUSTRIAL EXCELLENCE & QEHS
Quality - Usine 4.0 – Traceability – Industrial Projects
Christophe Regnault



MARKETING
Innovation – Digital Customers
Xavier Dubernat



HUMAN RESOURCES
Talents - Training - Staff Management
Hubert Leroy



FINANCE, SI, SUPPLY CHAIN
Digital – Customer Service - Finance
Nicolas Suret, Antoine Grillard





PAM BRAND INNOVATION, A PRIORITY

CERBERE SMARTS PRODUCTS



Multi-function and universal sensor for active monitoring on pillar fire hydrant

PAMREX GRIPTOP



A high performance surface treatment for the need for enhanced grip.

AQUACOAT PIPE & FITTINGS



An innovative coating, BPA and VOC free, for all our pipes and now also for our fittings.

BIOGAN



Our New Gravity Hose, Ductan Liner, Aquacoat Liner, BPA Free

ITINERO® (PAM BATIMENT)



ITINERO® is designed for civil engineering structures and bridges. It resists corrosion and high temperature variations, thanks to the zinc and epoxy coating.

The Technocentre

About 40 people working on R&D in Technocentre, Engineers and PhD Students
Transversality with Lorraine University, CNRS-Nancy or SUN in international, etc.





PAM BRAND INNOVATION, A PRIORITY

Incremental or rupture innovation



The Activity files around 40 patents per year worldwide,
5 inventions having been the subject of a first patent filing and its extensions in around 35 countries
In 2020, new products represented 31% of the activity's turnover
About 1 in 4 products did not exist 5 years ago.



Innovation is also industrial 4.0 performance, digital solutions and BIM, robotization, testing high-tech machines
at the service of plants' and customers worksites' performance



A Dedicated Skills Center Materials & Processes

A Dorsal Column Materials & Processes



metallurgy

process

coatings

corrosion

alimentary

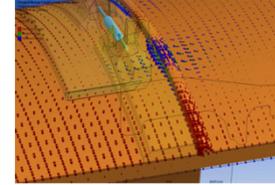
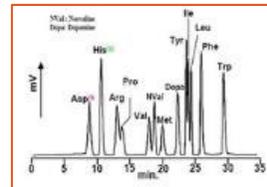
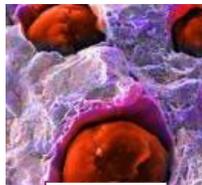
metallography

analytic
chemistry

soils
analysis

health
compliance

mineral
chemistry



Test site in extreme corrosive and saline environment at Mont Saint-Michel





TECHNOCENTER IDENTITY RECORD

Technocentre is a dedicated structure to continuous performance, since the research and international regulatory expertise phase, to product development, up to industrialization. It is responsible for our technical nature and efficiency, extension of the quality of our ranges and assistance to the needs in the field: plants, product manager, customer. It is based on:



Experienced staff of
More than 130 employees, Engineers, Technicians, Researchers and PhD Students



1 structure based in Maudières, France, near the Head Office.
A central European place for plants and international customers
The global Technocenter was created in 1960s (1930 for the R&D center)



A High Tech equipment for laboratories (such as the Scanning Electron Microscope), various tools for simulation engineering (example with the simulation of the ductile iron's flow through a modeling tool with water), regular investments (example in 2019 with laser profilometers, ICP and GCMS tools for sanitary excellence).



Deployment of plant 4.0, on site support and implementation of investment (recently 10 robots or new cementation)

Transversality with CNRS, SUN in international, etc.
Support of Saint-Gobain group entities such as SGR or CRIR
Participation in the standardization and reflection committees of the water network





SAINT-GOBAIN PAM CANALISATION





SAINT-GOBAIN PAM CANALISATION IN FRANCE

4 plants in Lorraine



2020 Turnover
442 M€

5 regional management
Covering the French territory



Industrials Investment
Around 130 M€ between 2017 and
2020

More than 1700 employees
Incl. 108 apprentices



12 points of sale
and stockgrounds

** Figures impacted in the first half of 2020 by the Covid crisis*





SAINT-GOBAIN PAM CANALISATION

OUR SITES IN LORRAINE



Maidières

Technocentre
131 employees

Toul

Assembly of valves
and fire hydrants
52 employees

Foug

Production of ductile iron pipes
And fittings
301 employees

Metz

Pont-à-Mousson

Toul

Nancy

Pont-à-Mousson

Head-office
201 employees

Pont-à-Mousson

Production of ductile iron pipes
629 employees

Blénod-les-PAM

Production of ductile iron municipal castings
279 employees

Fléville

Sales Agency





SAINT-GOBAIN PAM CANALISATION **PONT-A-MOUSSON FACTORY**



Pipes for the transport of drinking and wastewater
From DN 150 to 2000 mm

One material : ductile iron

One process : centrifugation

629 employees

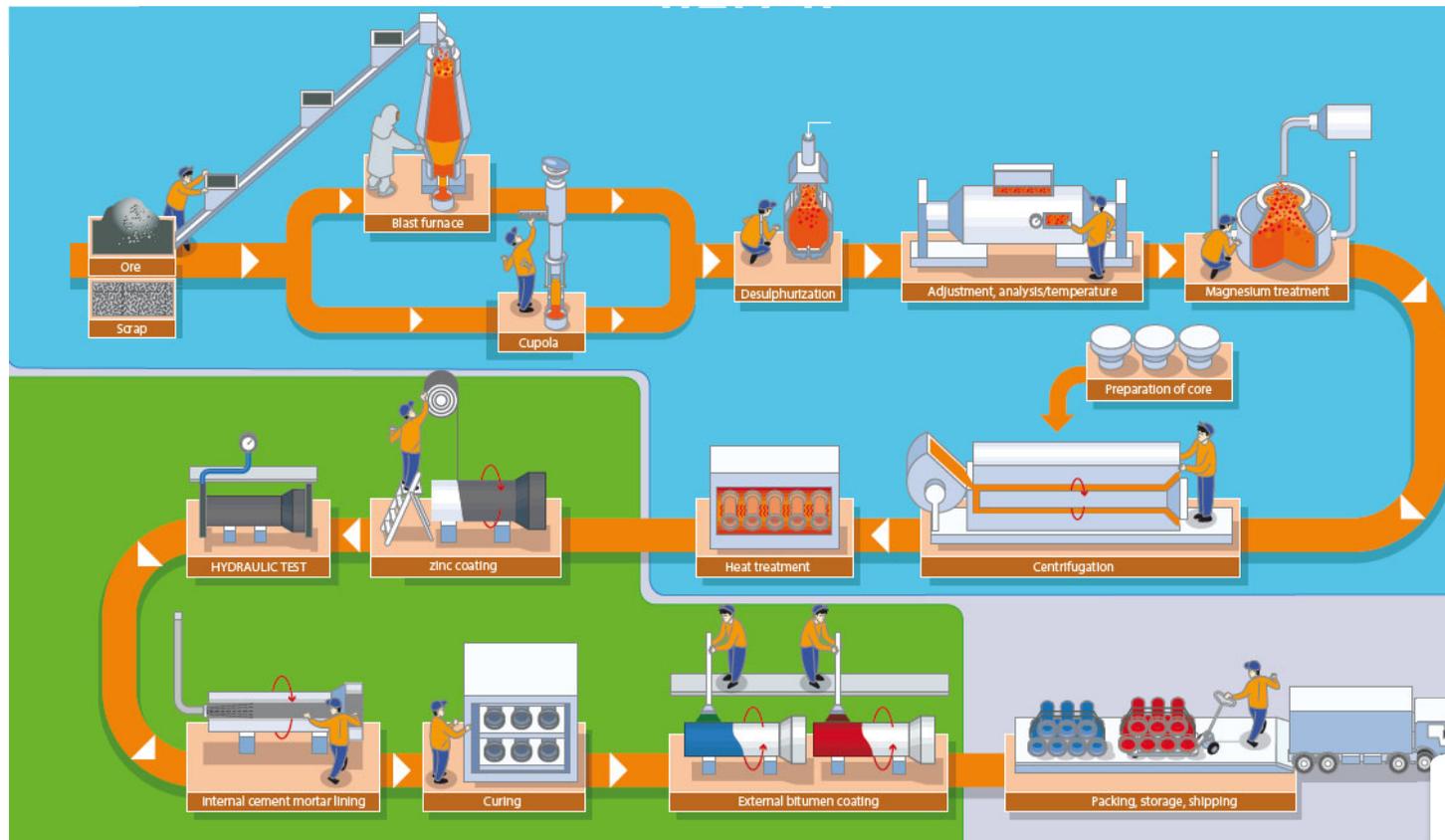
About 130 000 tonnes produced by the plant in 2020

** Figures impacted in the first half of 2020 by the Covid crisis*





SAINT-GOBAIN PAM CANALISATION PONT-A-MOUSSON FACTORY





SAINT-GOBAIN PAM CANALISATION LORRAINE FACTORIES

** Workforce exclude apprentices*

** Figures impacted in the first half of 2020 by the Covid crisis*



Foug Factory

Pipes for the transport of drinking and wastewater from DN 60 to 160 mm, and fittings

301 employees

Approximately 58,000 tonnes of pipe produced and 7,000 tonnes of fittings in 2020



Blénod Foundry

Municipal castings products, fittings and valves

279 employees

More than 36,000 tons produces in 2020



Toul Factory

Gates from DN 40 to 400, pillar fire hydrant DN 80, 100 & 150 and ZMU pipes from DN 700 à 1200

52 employees

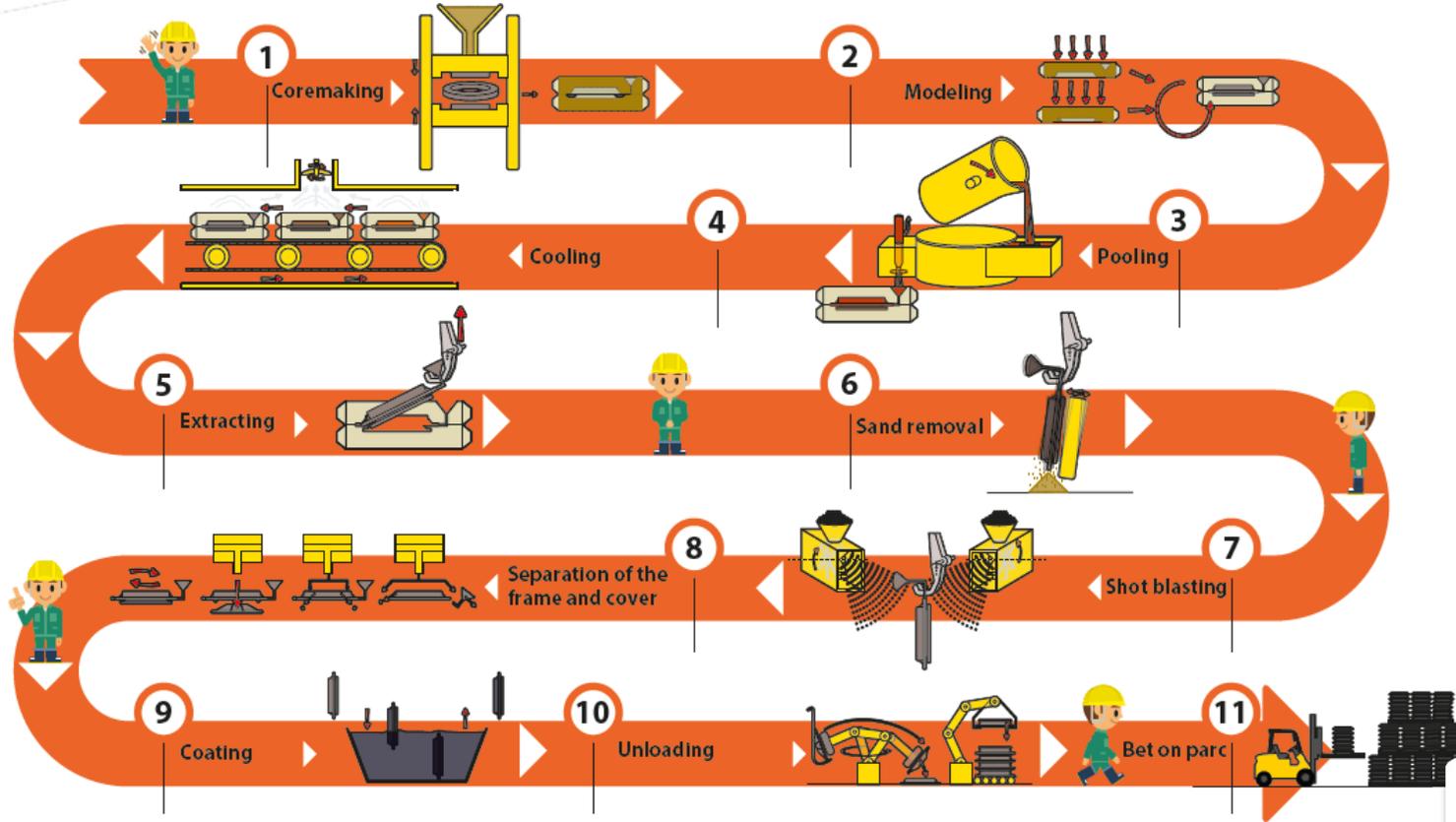
More than 88,000 items sold in 2020 (valves and pilar) and 9,200 tonnes of pipes in 2020





SAINT-GOBAIN PAM CANALISATION

MUNICIPAL CASTING PROCESS – BLENOD FACTORY





DIGITAL CULTURE TRANSFORMATION OF TOOLS AND PRACTICES

Digitalisation à tous les niveaux

Production – Ortems
Internal Control – Bonita
Transports – TMS Transporeon
Maintenance & Supply Chain – WMS
Sales – Salesforce CRM, FullPam
Web/app – Pamdrive, Pamtools...
Formation – Boost
Conception - BIM



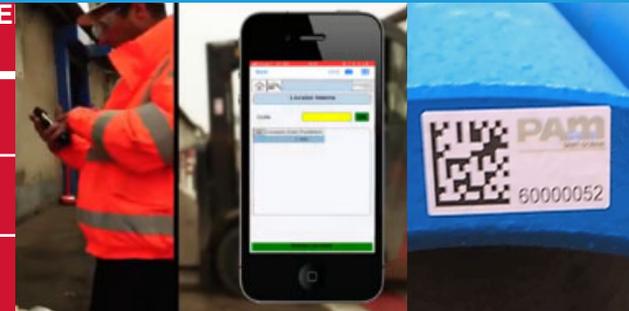
Workflows, productivity gain, modeling traceability

PRODUCTS STOCK BALANCE

FACTORY MAINTENANCE

WMS (FINISH PRODUCTS ON STOCK)

TMS (TRANSPORT MANAGEMENT)



Robotization and modernization

10 Robots in Pàm's factory
Automation of valve touch-ups in Toul
Coating in Foug
Electrical distribution redesigned in Blénod
New cementing



Rationalization, flexibility, product quality, safety





SAINT-GOBAIN PAM SOIL AND DRAIN





SAINT-GOBAIN PAM BATIMENT IN FRANCE

**1 Plant in Bayard,
Haute Marne**



**TURNOVER 2020
61 M€**

220 Employees



**Industrial investments
Around 8 M€ between 2017
and 2020**

** Figures impacted in the first half of 2020 by the Covid crisis*





SAINT-GOBAIN PAM BATIMENT

1 PLANT IN FRANCE



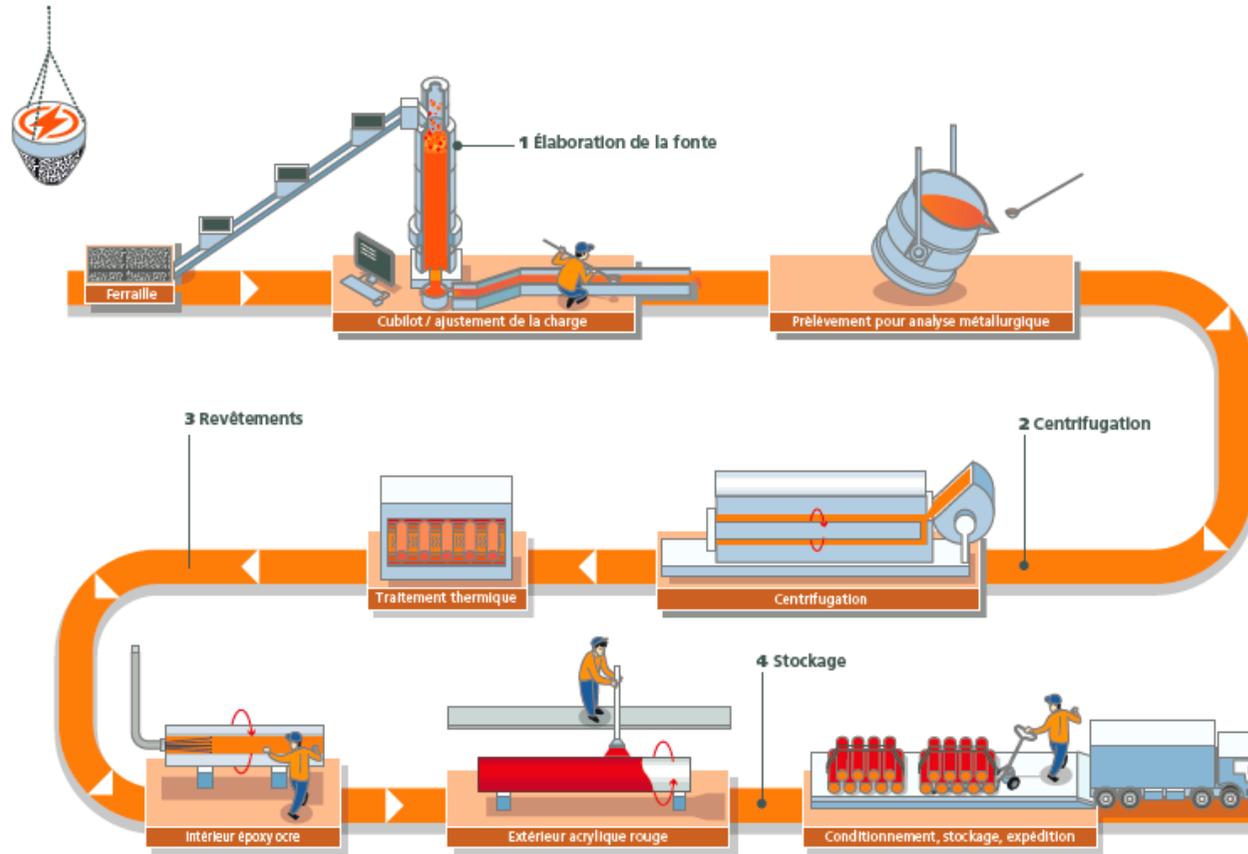
Bayard Factory
(Haute-Marne)
Founded in 1513





SAINT-GOBAIN PAM CANALISATION

PROCESS OF THE BAYARD FACTORY





SOCIETAL COMMITMENT / CSR



SOCIETAL COMMITMENT / CSR

A COMMON BASE, A GUIDE TO OUR EVERYDAY LIFE



PAM, serve water sustainably.

Far beyond the mere manufacture of piping systems, **PAM's purpose** is to serve water throughout the world by offering solutions that respect the resource and those who mobilize it.

To guide its actions in the most Responsible way possible, PAM relies on a core of values and pursues concrete objectives **shared with the group Saint Gobain.**





SOCIETAL COMMITMENT / CSR

RECOGNIZED HUMAN AND PROFESSIONAL VALUES

Adhering to the Saint-Gobain culture is a sine qua non of belonging to PAM. This is the basis of a shared state of mind towards an increasingly Responsible activity

Principles of conduct and action (PCA)

- 1 Professional Commitment
- 2 Respect for others
- 3 Integrity
- 4 Loyalty
- 5 Solidarity
- 1 Respect for the law
- 2 Care for the environment
- 3 Worker health and safety
- 4 Employee rights

Attitudes

- 1 Cultivate customer intimacy
- 2 Act as an entrepreneur
- 3 Innovate
- 4 Be agile
- 5 Build an open and Engaging culture



Top Employer

PAM contributes to Saint-Gobain's Top Employer certification. Issued by an independent organization, it emphasizes the quality of HR processes, in particular the career development policy.



Of our French employees are proud to work in Saint-Gobain PAM



In Brazil, the confidence in the Pipe Activity Management progresses again in 2020



MentalWellBeing program and sites QWL committes promote well-being at work.





SOCIETAL COMMITMENT / CSR

PROGRESS TOGETHER



Moove in France and UK / OpenJobs for international : tools that promote internal mobility and promotion of talents.



Digital learning paths to develop new leadership and contribute to business growth.



#GrowWithPAM

France exceeds legal target of 5% of work-study students with **127 apprentices in 2020**.

A pool of **recruitments**
New professional practices
a vector of **transmission of knowledge** specific to PAM.



In 1974, PAM set up a **Work assistance service (ESAT)** in its site of Blénod (France). In 2020 it employs **more than thirty disabled workers**.



Training courses intended to promote collaboration and synergies between countries, functions and businesses



The recruitment of women and their promotion to top management is an issue shared by Saint-Gobain and PAM. The WIN network is one of the many tools in place to achieve this.





SOCIETAL COMMITMENT / CSR

HEALTH, SAFETY OVER THE ENTIRE VALUE CHAIN

OUR FIRST RESPONSIBILITY ENSURING HEALTH AND SAFETY

- Of all our employees
- Of all the people present on our sites; temporary workers, subcontractors, transporters
- Of customers and users of our products
- Local residents around our sites and points of sale

OBJECTIVES

Everyone must do everything possible to contribute to the stated objectives of the EHS charter:

>>> zero work accident

>>> zero work-related illness

>>> zero environmental accident and maximum reduction of the impact of our activities on the natural environment

OUR TOOLS

- HES Charter, Energy policies
- SMAT
- Ergonomist on sites
- Indicators TF2, TF3
- Certifications ISO
- Sensitization





SOCIETAL COMMITMENT ENVIRONMENT, RECYCLABILITY

A high-quality material



100 % of ductil iron material can be indefinitely recycled without loss of performance (scrap or end of life)



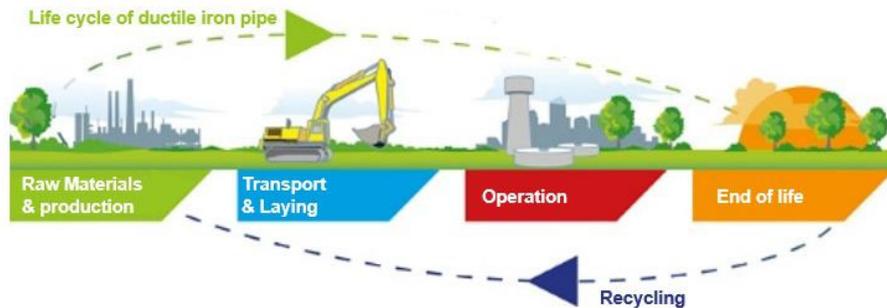
As all metals, **iron** and **scrap** from **recycling** and/or processing of **iron ore** are recyclable, unlike products from petroleum processing,



To save non-renewable raw materials it is better to choose **ductile iron**
Theoretical life of pipe carrying water: 100 years



Cast iron constitutes around 60% of the water networks currently in service in France.



Aquacoat

An innovative exterior coating without BPA or VOC for our pipes and now also for our fittings.



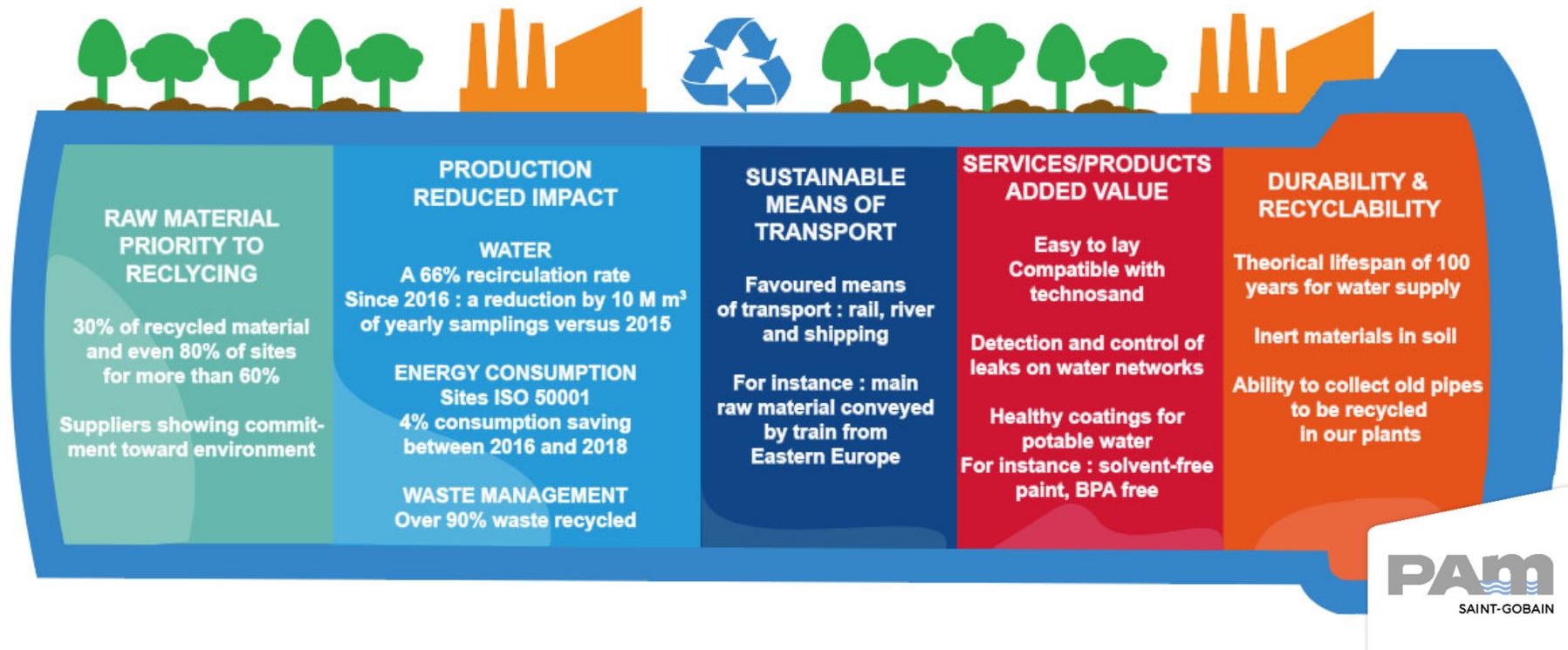


ENVIRONMENTAL RESPONSABILITY THE PAM ECOSYSTEM



GROUPE SHARED GOALS (2010-2025) :

- **50 %** of non-recovered waste, **0 %** in the long-term
- **15 %** of energy consumption, **-20 %** CO2 emissions
- **80 %** industrial water discharges in liquid form, **0 %** in the long-term





SOCIETAL COMMITMENT

ENVIRONMENT – END OF LIFE



Inert products for the soil

Pipes installation in the soil meets strict standards of non-pollution of both transported water but also of the soil.

This vigilance in the creation is therefore worth profit for the entire duration of the operation or non-operation.



Scrap recycling procedure

The ability to recover and re use steels and cast iron helps to conserve resources. If the client or the laying company chooses this solution, the cast iron products have the capacity to be recycled at scrap yards.



Circular economy Saint-Gobain PAM

Possibility of recovering old pipes to put them in our factories,
The pieces are re melted in the Bayard or Santander cupola, for the production of new pipes.
Quality controls are carried out throughout the different stages. The result of collaborative work, this recycling process has been validated in six pilot projects.





SOCIETAL COMMITMENT ENVIRONMENT – BETTER PRODUCE

RAW MATERIALS

Selectivity of our raw materials

Development of the Ecovadis Label for suppliers, Groupe charte

Use of valorising raw materials to recover

Using of recycled scrap iron in the cupola fusion process from ELV (End of Life Vehicles) and building demolition waste (Bayard)

DIMINUTION OF OUR CONSUMPTION AND EMISSIONS IMPACTS

100% of our pipes sold in Europe are produced in Europe and mainly (75%) in Lorraine, limiting CO2 consumption compared to pipes imported from Asia or India
ISO 14001 & ISO9001

For all our production site

ISO 50 001

Certification targeted for all PAM sites by 2021

Recorded for Bayard, Blénod, and Pàm

Others sites from CANA are certified such as Czech Republic

Recovery of 90% of our wastes and co-products in our Pont-à-Mousson factory (Road engineering (slag), Metal industry, Cement works (sands))

AWARENESS

Culture of big little gestures

Raising awareness of rational operation optimization of machines in Pont factory

Communication around Energy Policies on sites

ISO 50 001

HES day

KEY INITIATIVES

Grande Boucle project – Emeraude prize

Industrial water recirculation system, division of water volumes by 3

The lagoons - Bayard factory

Renovation of water collection basins to significantly reduce consumption of the factory

Re use of HFX gas

Recovery of the gas emitted by HFX by reusing it for our operating needs in Pont, Blénod and Head Office.

The carbon footprint from de pipeline manufacture to its transport for laying decreased since the 1930's manufactures. Development of Ca class' pipe, allowed to win again from the K class' pipes.





SOCIETAL COMMITMENT SGPAM'S REBOUND INFLUENCE ON THE ECONOMY



➤ Integrated business villages in Pont and Foug

➤ Intervention led by a responsible purchasing charter

- Integrity (no conflict of interest)
- Systematic HES components in the development of supplier specifications.
- Bilateral respect of employees' rights (no-discrimination, convention of the international labor organization, forced labor vigilance)

Subcontractors in France and abroad respect commitments in terms of human rights, environment but also corruption. To achieve this, they set up and communicate their vigilance plan.





SOCIETAL COMMITMENT

SGPAM'S REBOUND INFLUENCE ON THE ECONOMY



Indirect jobs

Via our production, energy, transport, general expenses purchase (supplier, subcontractors, service provider).

Local companies and beyond involved in: maintenance, industrial cleaning, trolleys, transport, sawmill, scaffolding...

- Including 30 regular external companies, representing 590 000 hours of work in SGPAM
- 188 independent contractor in 2019
- More than 60% of SGPAM's purchases are made in France (including around 30% in Grand Est), our abroad purchases mainly relate to raw materials not available in France



Induced jobs

Hundreds of jobs created in SGPAM's area of activity through consumption and investment made from wages derived from direct and indirect jobs. Multiplier effect of economic activity.



Linked jobs

Via accompanying of our projects and worksites in France and abroad (project tonnage/ number of working day / people for the projects)
Via the Economic and Territorial Contribution of Companies, employer's contributions, etc.





THANK YOU

