



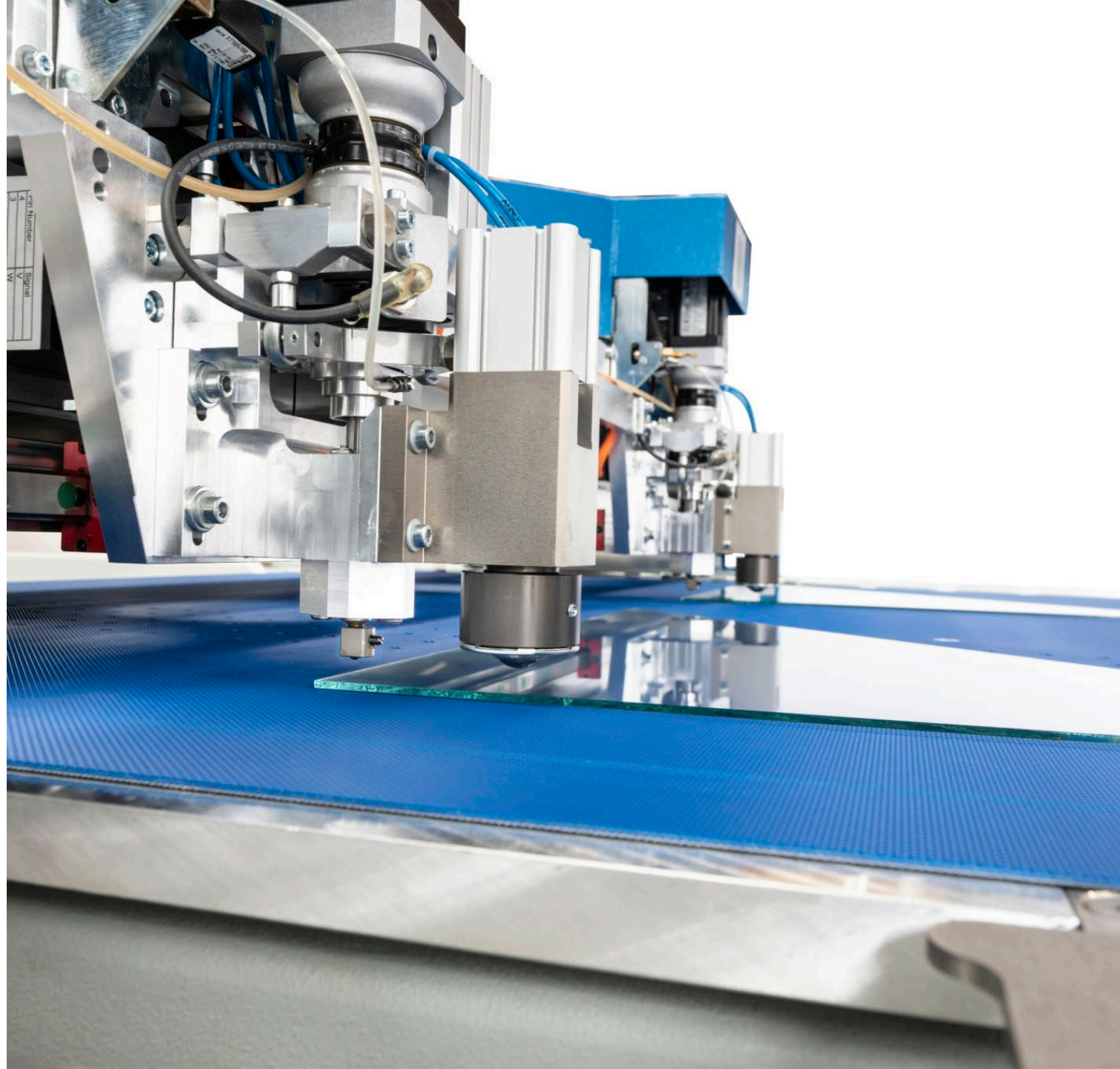
Glaston Corporation Capital Markets Day 2021

CMD 2021

26 August 2021

glaston
seeing it through®

Automotive & Display Technologies highlights



Meet
Robert
Prange

SVP, Automotive
and Display
Technologies



Automotive & Display Technologies

Leading supplier for pre-processing solutions for automotive glass with **>40% market share**

Standardized and **tailor-made solutions** for the processing of automotive and display glass from the raw glass to the final product

In the automotive industry, the use of glass is increasing in the exterior and the interior and new functionalities and glass types like thin glass increase **processing complexity** and **quality requirements**



The industry's most comprehensive product portfolio

Automotive

Key trends in Automotive glass market 1/2

Large glass areas

Large and formed displays

Cameras for advanced driver assistant systems

Coated and switchable glazing for temperature control

Laminated sidelites

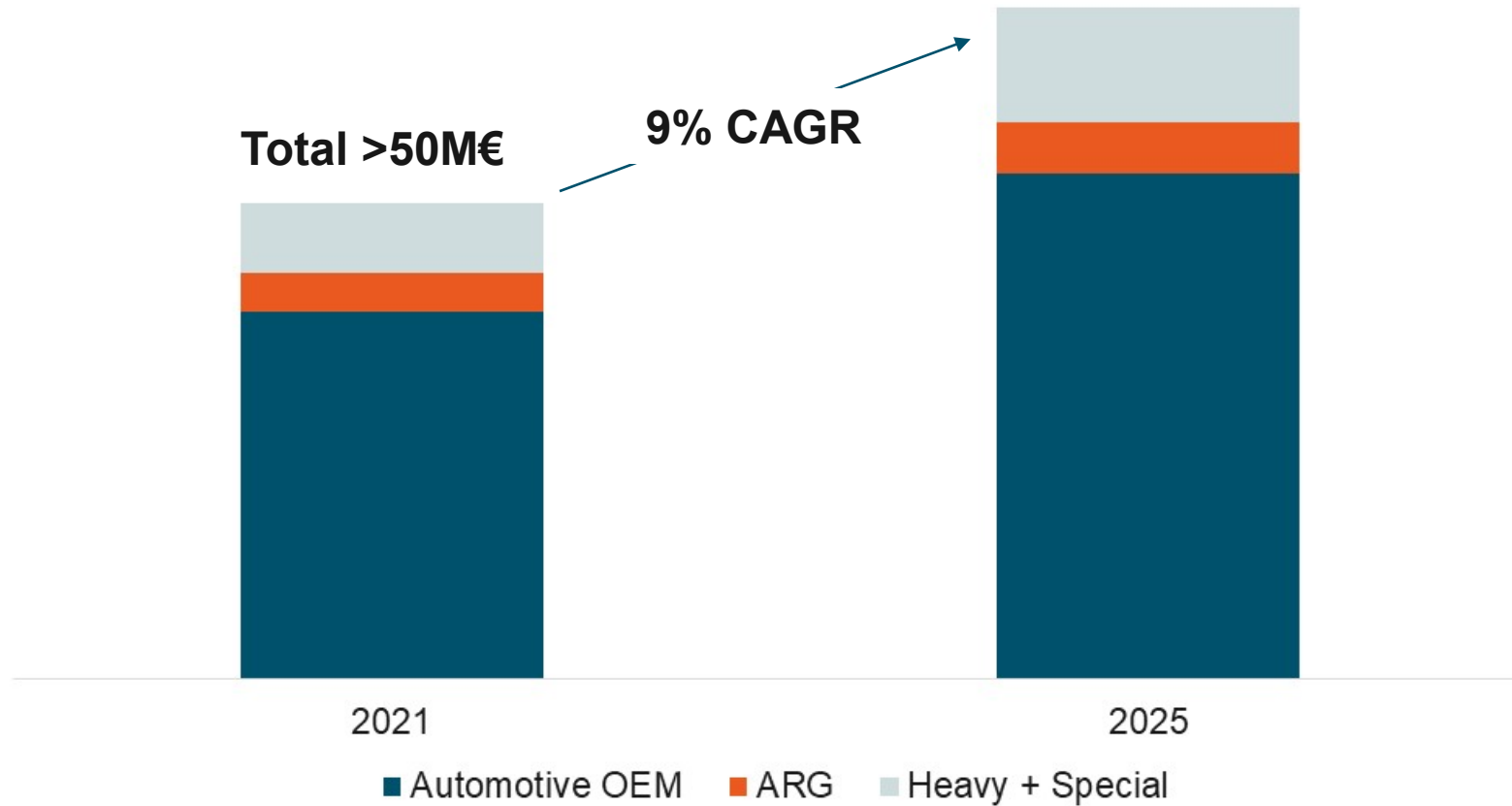
Focus on lounge feeling, natural light, transparency

Key trends in Automotive market 2/2

Across the regions

- 
- ↗ Complex & larger sun roofs and windshields
 - ↗ Smart functionality (switchable glazing) and driver assistance tools (cameras) in glazing
 - ↗ Coatings to control heat gain (and improve fuel efficiency) and more silk prints
 - ↗ Laminated sidelites for improved safety & better acoustic performance
 - ↗ Thinner glass (and non-soda lime glass) to cut weight (1 mm off saves 2 kg in weight for a windshield)
 - ↗ Asia a major growth region, especially China
 - ↗ Even more automation & increasing flexibility of production (e.g., smaller batches)

Addressable Automotive equipment market: size and growth*



Display

Display Focus Areas

Automotive interior displays

- Glaston has already sold several Pre-Processing lines for automotive interior display glass that often have complex shapes and are curved (or formed).
- In Heat Treatment we developed a furnace with a lead customer



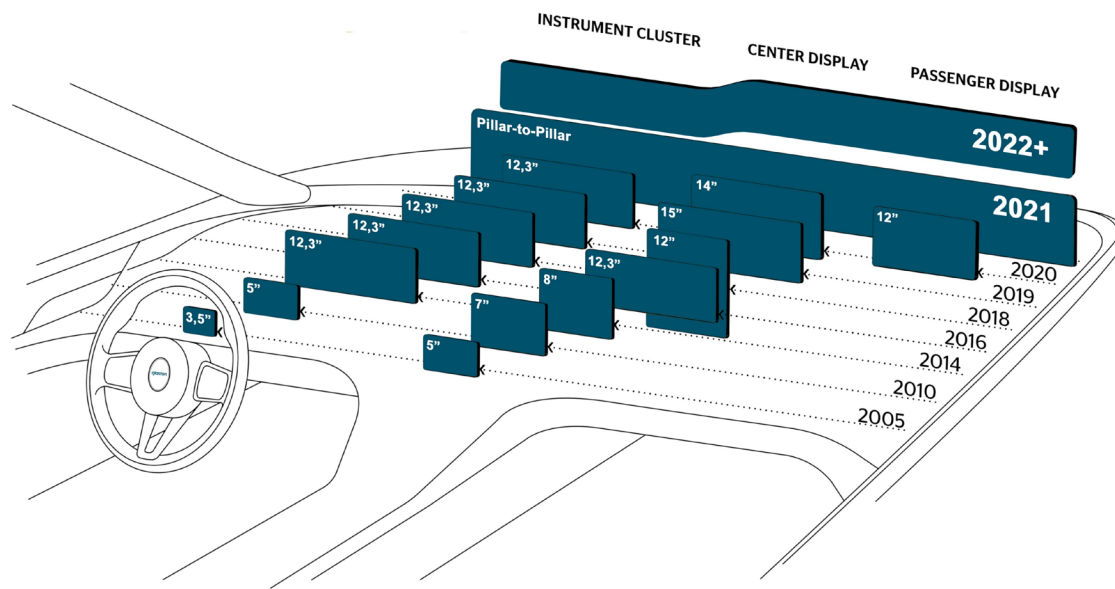
Display glass for new applications

- Display glass is starting to find applications in architectural segment for laminating thin display glass to normal glass for hurricane proof windows
- Additional possibilities based on existing customer cases in electrochromic devices.

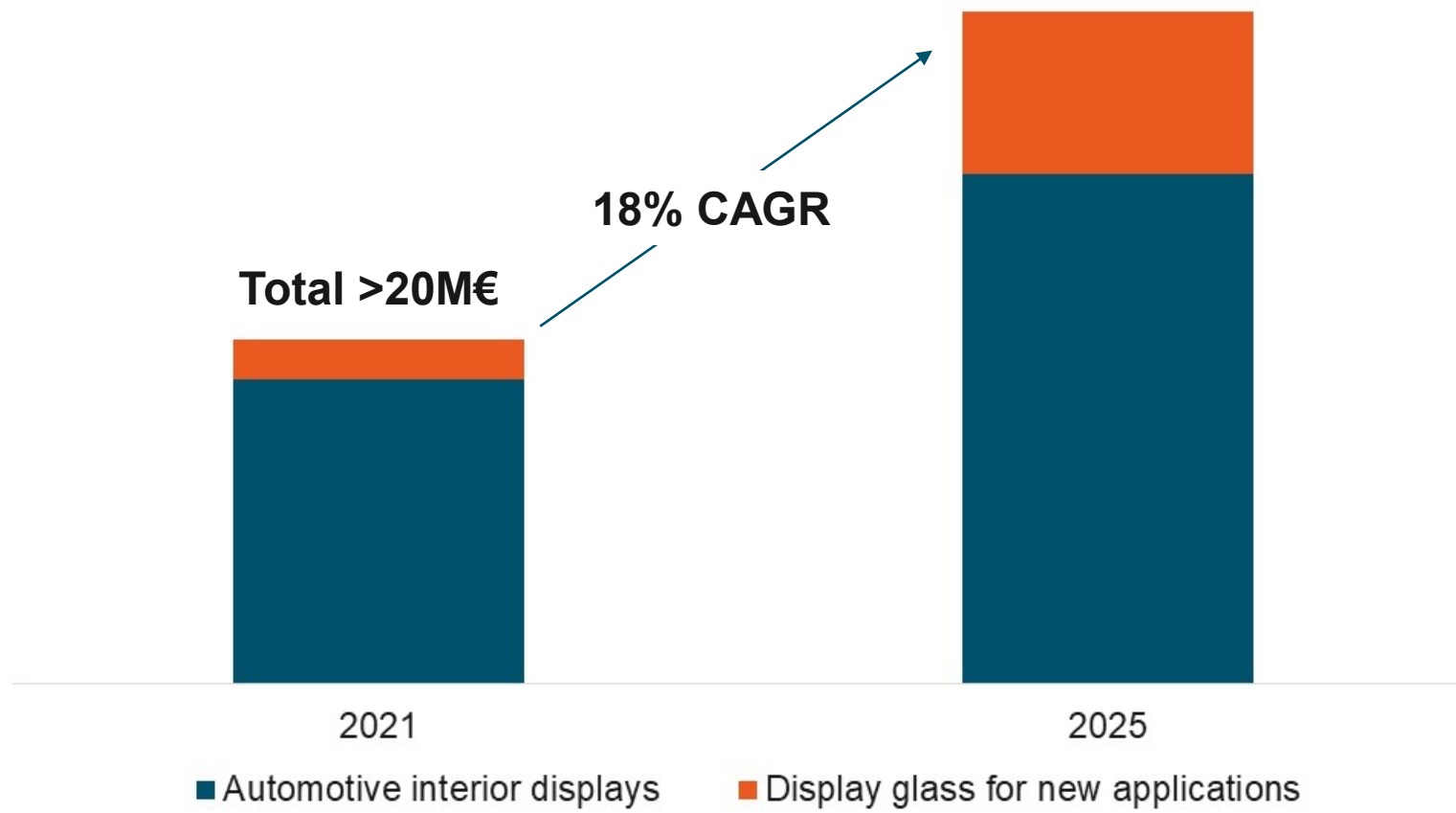


Automotive Interior Displays

Trend to complex formed Glass Displays

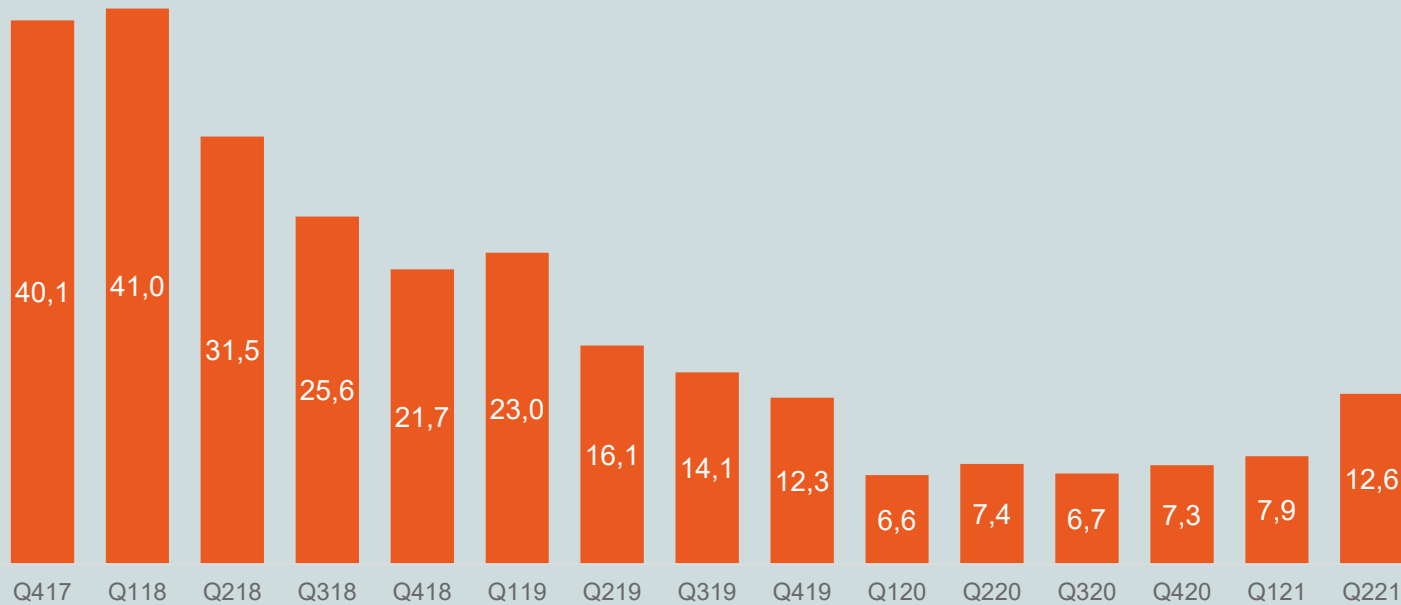


Addressable Display equipment market: size and growth*



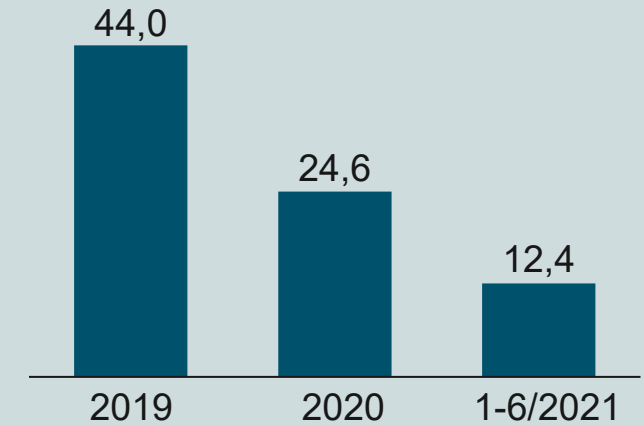
Technologies order intake & A&D segment net sales and EBITA

Machine order intake A&D Technologies, rolling 12 months [M€]

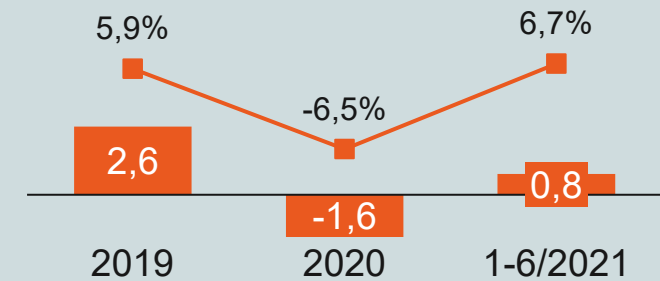


*A&D segment 2020 & 01-6/2021 including Emerging Technologies organization change

Net sales A&D segment* [M€]



EBITA A&D segment* [M€, %]



Automotive & Display

Growth plan actions into 2025

1. Automotive industry is a relatively **mature market** with constant price pressure
 - Continues improvement of cost / performance ratio
2. Display market is still **rapidly evolving**
 - Add resources to gain market share and benefit from market growth in the targeted areas
3. Huge **installed base**
 - Provide additional upgrades to ensure a longer lifetime and increased performance of our customers' installed base while keeping their technology up to date.
4. Continue commercializing **new holistic solutions**
 - First customers are starting to use our Hyperflex Grinding System
5. Benefit from **most comprehensive offering** in the market
 - Develop new generations of furnaces to strengthen our capabilities in Heat Treatment for Automotive & Display

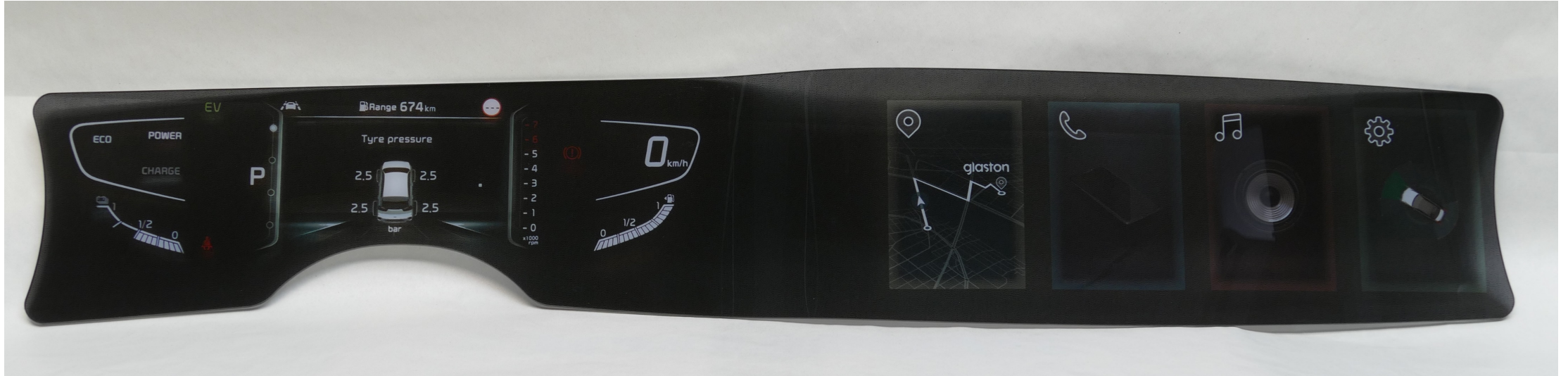


Automotive & Display technologies & innovations



Formed Automotive Display

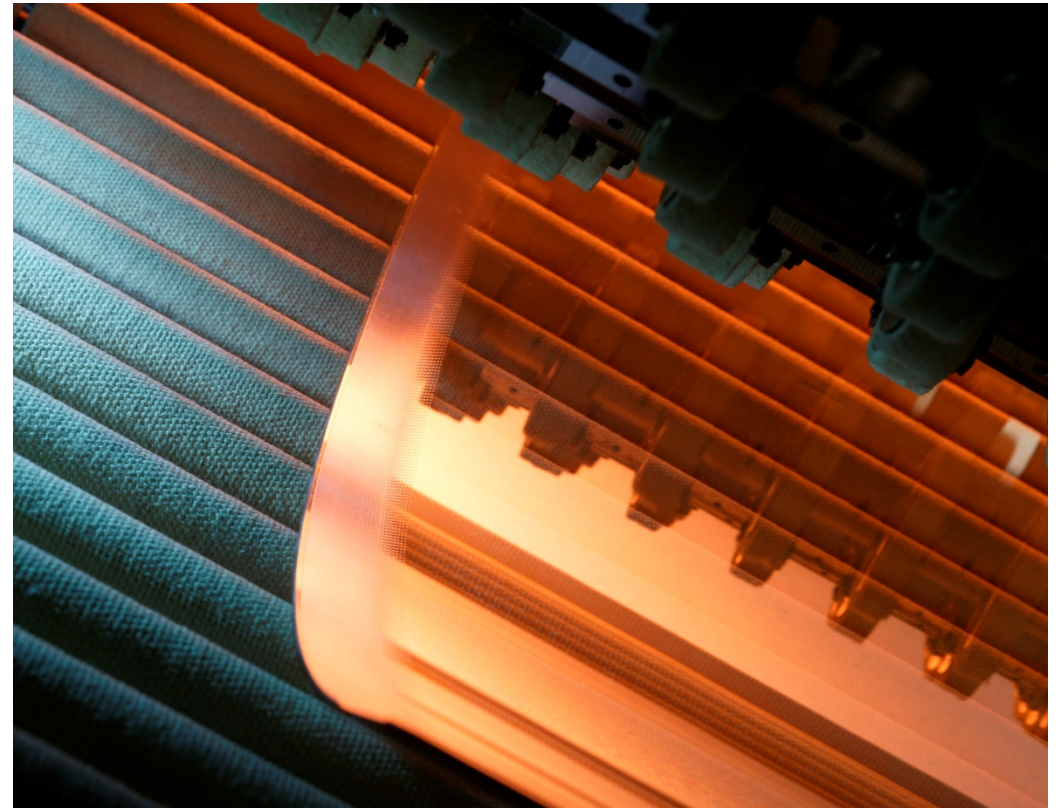
Made with 100% Glaston Technology



- 1.1 mm glass
- Cut and ground with chamfered edges
- Hot formed
- Laminated to create demonstrator part

Why to buy Glaston Automotive & Display equipment?

- Since more than 50 years we are a **reliable partner** for our customers
- Our **excellent worldwide service network** offering **lifecycle service solutions** is the basis for a sustainable and long-term relationship
- Our customers appreciate the **high availability** and **high yield** of our equipment – especially when producing the most challenging end products
- Our systems are **scalable and modular** for **small to high volume** production
- We have a **holistic process understanding** to **support and consult** our customers
- We offer the **most comprehensive product portfolio** in the industry





> www.glaston.net

Thank you!

glaston
seeing it through®