

Powering Growth into the New Economy
Global Summit of Women
Madrid 2024

Saint-Gobain, leading towards Sustainable Buildings

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SAINT-GOBAIN

#makingtheworldabetterhome



**Saint-Gobain:
leading towards sustainable
buildings**

#makingtheworldabetterhome

SAINT-GOBAIN AT A GLANCE

A STRONG GLOBAL LEADER CLOSE TO OUR CUSTOMERS



Commitment to achieve
carbon neutrality in 2050



World or European leader
in most of our businesses

Founded over

350 years ago

Locations in

76 countries

Sales

47.9 bn€

Around

160,000

employees

Around

900

manufacturing facilities
around the world

2,700 sales outlets
8 R&D centers

Key brands



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Commitment to achieve
carbon neutrality in 2050



World or European leader
in most of our businesses



Saint-Gobain SPAIN

115 years history

4,000 employees

30 factories

1,500 Mill €

Founded over

350 years ago

Locations in

76 countries

Sales

47.9 bn€

Around

160,000
employees

Around

900
manufacturing facilities
around the world

2,700 sales outlets
8 R&D centers

Key brands

placo
SAINT-GOBAIN

isover
SAINT-GOBAIN

weber
SAINT-GOBAIN

climalit
SAINT-GOBAIN

ecophon
SAINT-GOBAIN

SAINT-GOBAIN

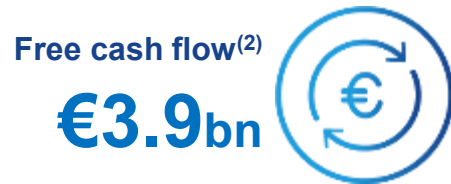
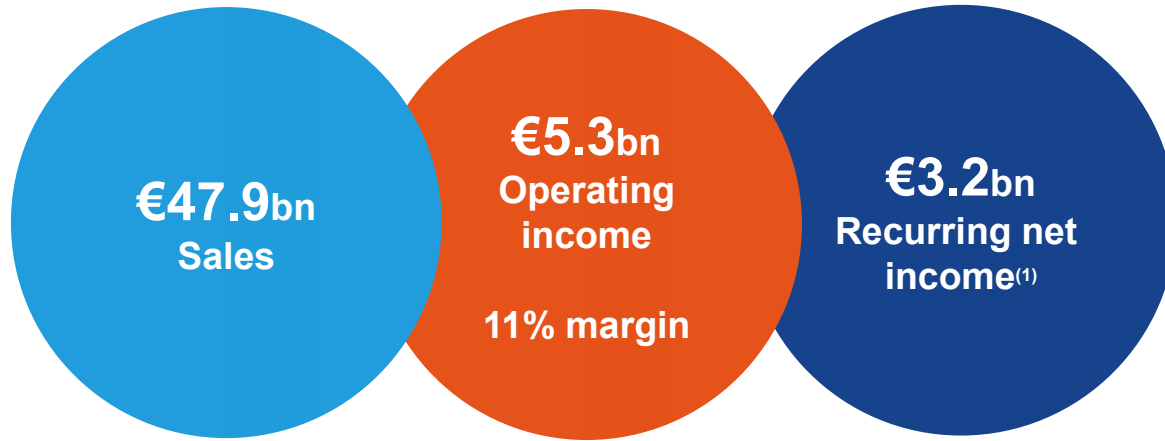
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SAINT-GOBAIN

SAINT-GOBAIN

SAINT-GOBAIN AT A GLANCE

WITH A REMARKABLE FINANCIAL PERFORMANCE



SAINT-GOBAIN AT A GLANCE

WITH A COMPLETE PORTFOLIO OF BUILDING SOLUTIONS



- 1 FACADES
- 2 TECHNICAL MARKETS
- 3 PARTITIONS
- 4 CEILINGS
- 5 FLOORING



- 6 JOINERY AND WINDOWS
- 7 INTERIOR FINISHING AND DECORATION
- 8 LANDSCAPING
- 9 SHELLING AND INFRASTRUCTURE
- 10 DRINKING WATER SUPPLY AND SANITATION



SAINT-GOBAIN AT A GLANCE

AND A STRONG PURPOSE

MAKING THE WORLD A BETTER HOME

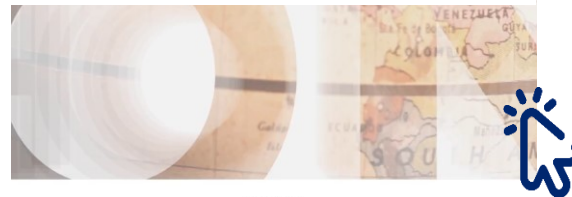


The result of an international collaboration involving nearly 15,000 Group employees, our purpose expresses in a few words what we are, what brings us together and defines our common project, the future we want to build together.

THIS IS THE PROFOUND AMBITION OF OUR PURPOSE:

To act every day to make the world a more beautiful
and sustainable place to live

[Click here to find out more!](#)



HOGAR

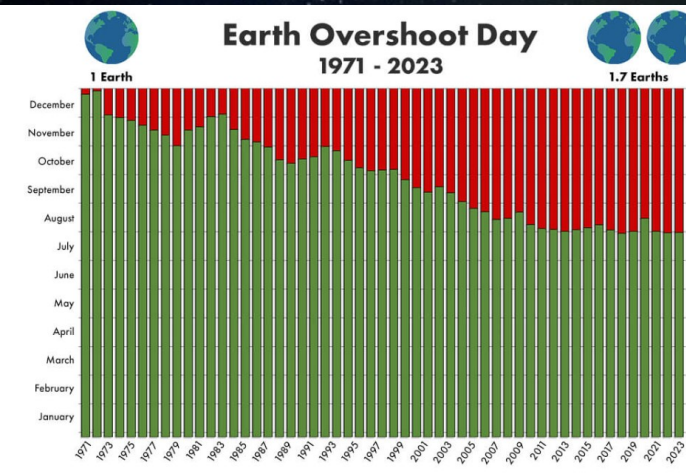


HOGAR

2nd August 2023



1.7 planet resources/ year



MAJOR TRENDS ACCELERATING THE NEED FOR SUSTAINABLE ACTIONS



World population
x 3.7



GHG
x 13

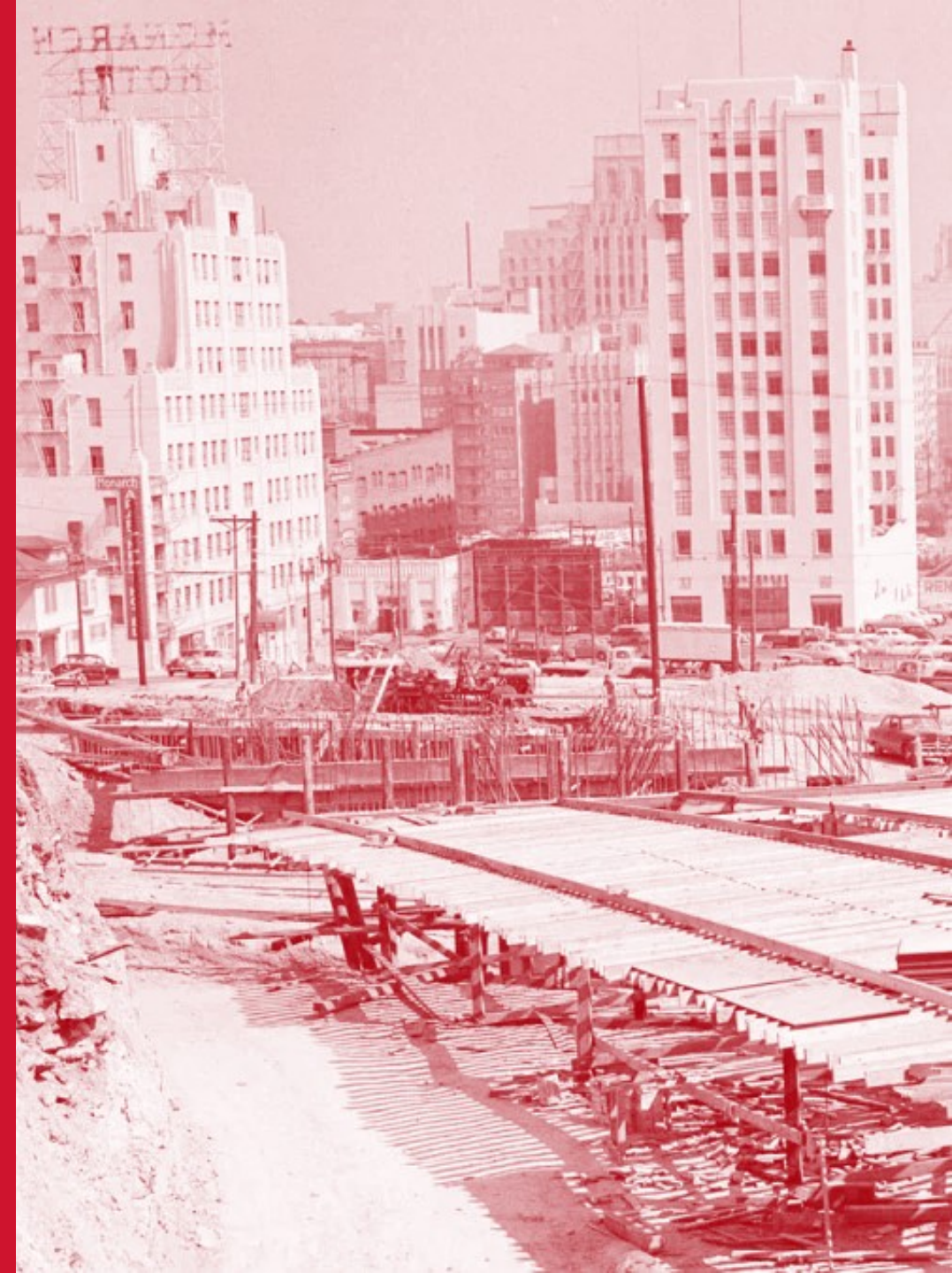


EU cities
80%

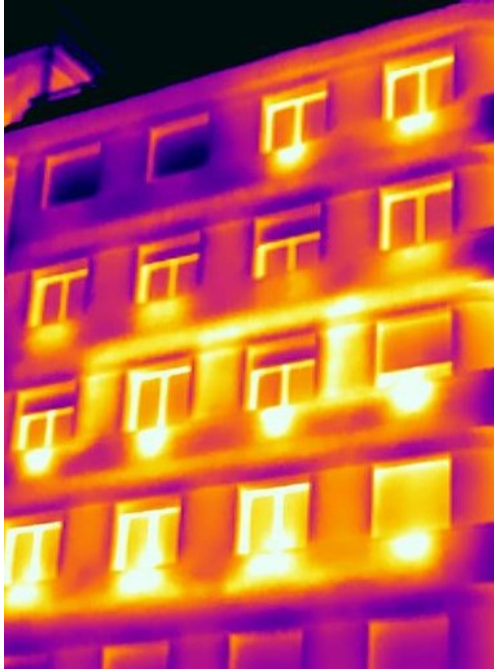


world
20 MegaTons

« It is not sustainable to build our cities
as we have been doing until now »



THE CHALLENGE IS TO MEET GROWING NEEDS WITH LESS CARBON & RESOURCES



38%
energy consumption
buildings



40%
of CO₂ emissions
due to **buildings**



40%
Raw material use



40%
Waste generation
due to **buildings**

Saint-Gobain's solutions play a critical role in addressing these challenges



BUILDINGS ARE PART OF THE SOLUTION

AND THE SOLUTION GENERATES PROSPERITY



Saint-Gobain's solutions play a critical role in addressing these challenges

SUSTAINABILITY: A LONG-STANDING COMMITMENT FOR SAINT-GOBAIN

Before 2015

- 2003 SG Principles Conduct & Action
- 2003 Signature of UN Global Compact
- 2009 Compliance program formalization
- 2014 Sustainable habitat roadmap
- 2015  SUSTAINABLE DEVELOPMENT GOALS

2015 - 2025

2015 Setting of ambitious targets 2025:



-20%

CO₂ emissions



-80%

water discharge



-50%

non-recovered waste

vs. 2010 at iso-production

2019 Signature UN Global Compact pledge targeting carbon neutrality by 2050



2030

PROCESSES

Science-Based Targets

Scope 1 + 2
(Direct + Indirect)

-33%

Scope 3
(Value chain)

-16%

Absolute emission reduction vs. 2017

SOLUTIONS

- Offer the best low-CO₂ and **sustainable solutions in our markets**
- Enable our customers to **decarbonize their processes**

2050

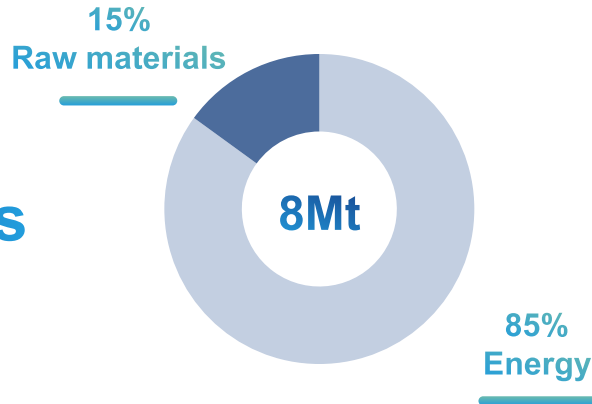


Objective 2050
ZERO CARBON

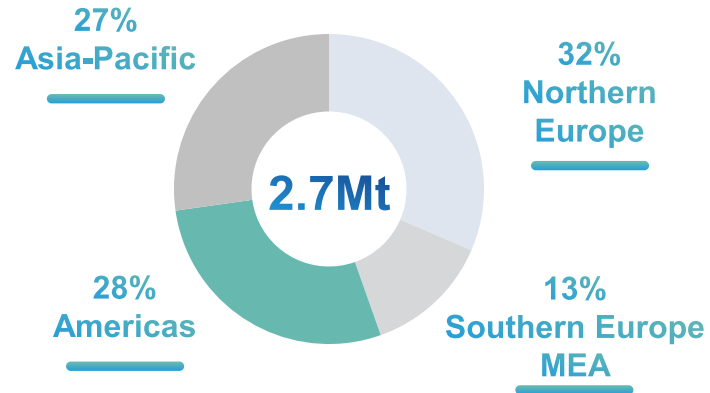
Next step: Setting out the path to reach net-zero carbon by 2050 & enable low carbon buildings

WE ACT UPON ALL 3 EMISSION SCOPES

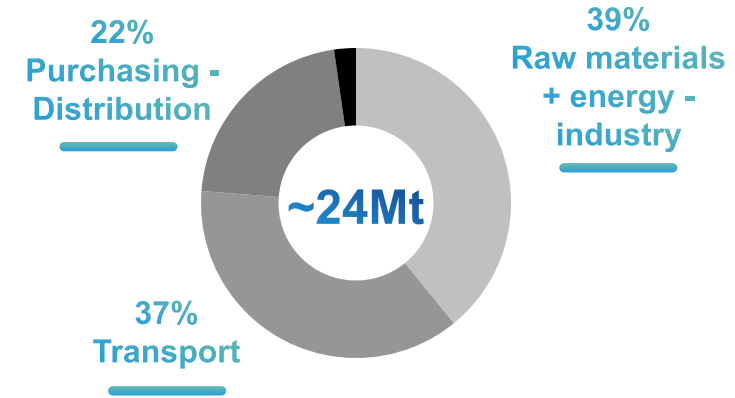
Scope 1 (Direct)



Scope 2 (Indirect)



Scope 3 (Value chain)



Levers for action



Innovate on our processes

industrial, product design



Optimize/reduce our energy use



Transition to carbon free energy



Suppliers & Logistics

raw materials & transports

2030 OBJECTIVES



WATER



CO2



CIRCULAR ECONOMY



PRODUCT STEWARDSHIP

OUR OBJECTIVES FOR 2030 COMPARED TO 2017

-50%
Industrial water withdrawal

0
Water discharge in area with extremely high water risk

-33%
Scope 1 & Scope 2

-16%
Scope 3

-80%
Non valorised production residue

+30%
Virgin raw materials avoided

30%
of recycled or bio-sourced content

100%
recyclable packaging

100%
LCA
for all of Group product ranges

STRONG COMMITMENT TO SUPPORT OUR PATHWAY TO CARBON NEUTRALITY



INCENTIVES

ESG metrics part of long term management incentives

- CSR targets relative weight at 20% in 2020 up from 15% with CO₂ emissions accounting for 10% (vs. 5% previously)



CARBON PRICE

Internal carbon prices

- 30€/t for industrial investments
- 100€/t for R&D investment in breakthrough technology



INVESTMENTS

Annual CAPEX and R&D investments over the next ten years



SAINT-GOBAIN RE-IMAGINES THE NEW BUILDING CONSTRUCTION

SUSTAINABILITY

BETTER FOR THE PLANET



Energy and carbon



Ressources & circularity

SUSTAINABLE
CONSTRUCTION
BY SAINT-GOBAIN

BETTER FOR THE PEOPLE



Health and safety in
jobsites



Safety and health indoor
spaces

BETTER ECONOMIC IMPACT



Productivity



Value for property

BETTER QUALITY



Reliability



Aesthetics

PERFORMANCE

(RE)imagina

CLIMATE CHANGE: DECARBONIZED SOLUTIONS PROVIDER

~60%

Sales contributing directly or indirectly to lower CO₂ emissions

~50%

Sales for the renovation market*



Eclaz Glass

+20% energy efficiency
+10% thermal insulation
+10% solar gain



Glass wool insulation

-40% CO₂ emissions
thanks to energy savings



External thermal insulation

30% heating savings
Gain of up to 3 energy classes



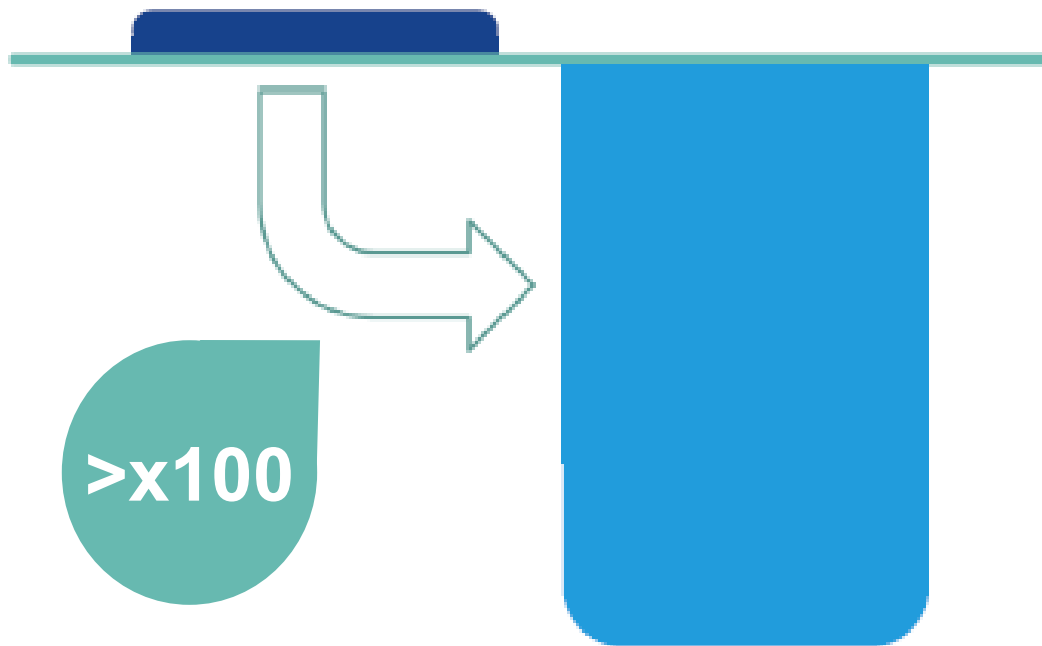
Sekurit solutions

Thermally insulating glazing
for greater autonomy of electric vehicles
+30km autonomy

INSULATION, THE HIDDEN HERO TO AVOID CO2 EMISSIONS

Saint-Gobain CO₂
emissions in one year
(scope 1+2)

10.7Mt



>x100

-1,200Mt

Avoided emissions thanks to ISOVER
insulation solutions in a year

Example of Glass wool

A typical ISOVER glass wool product
has amortized the CO₂ emitted in its
production, transport & disposal just
3 months after installation





2050
NET ZERO CARBON

FIRST GLASS WITH LOW CARBON FOOTPRINT

SAINT-GOBAIN GLASS



64%
RECYCLED
CONTENT



GREEN
ENERGY IN
PROCESS



R+D EXCELLENT
APPROACH

-42%



GWP vs
PLANICLEAR®



ORAÉ®: First glass certified product C2C 4.0





ISOVER
SAINT-GOBAIN

placo
SAINT-GOBAIN

arena
APTA
futuRE

Placo®
planet
futuRE

Perfil
planet
futuRE

Placo® Planet
futuRE

arena APTA
futuRE

Perfil planet
futuRE

28%
RECYCLED
CONTENT



78%
RECYCLED
CONTENT



- 66%
CARBON
FOOTPRINT



-20%
SYSTEM GWP

System Partition
futuRE



FIRST TILING MORTAR WITH REDUCED CARBON FOOTPRINT



NEW FORMULATION INCLUDING WASTERIALS



-15% INSTALLATION TIME



PACKAGING 100% RECYCLABLE

-15% CARBON FOOTPRINT



Tiling mortar **Webercol futuRE**



CIRCULAR ECONOMY SERVICES



PLASTERBOARD RECYCLING SERVICE

> 14.000 recycled tons post consumer integrated in a new product: placoplanet



CONSTRUCTION GLASS RECYCLING SERVICE

35.000 tons recycled 2023 and integrated in a new low carbon product: orae



INSULATION RECYCLING SERVICE

From wastes in facades systems

CLIMATE CHANGE: WE ARE IDEALLY POSITIONED TO PLAY A MAJOR ROLE IN THE EUROPEAN RENOVATION WAVE

2030 ambition raised by the European Commission



-55%

greenhouse gas emissions*

* Compared to 1990



-18%

energy consumption
for heating and cooling*



x2

building energy efficiency
renovation rate
objective



Renovation wave:
35m buildings
to be renovated by 2030,
priority to public buildings, such as
schools and **hospitals**



€275bn

Annual additional investment
needs in building renovation



Renovation in the EU: >€10bn annual sales for Saint-Gobain

(RE) imagina

an attitude able to transform and preserve
our world

[Click here to find out more!](#)





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Saint-Gobain: leading towards sustainable Buildings



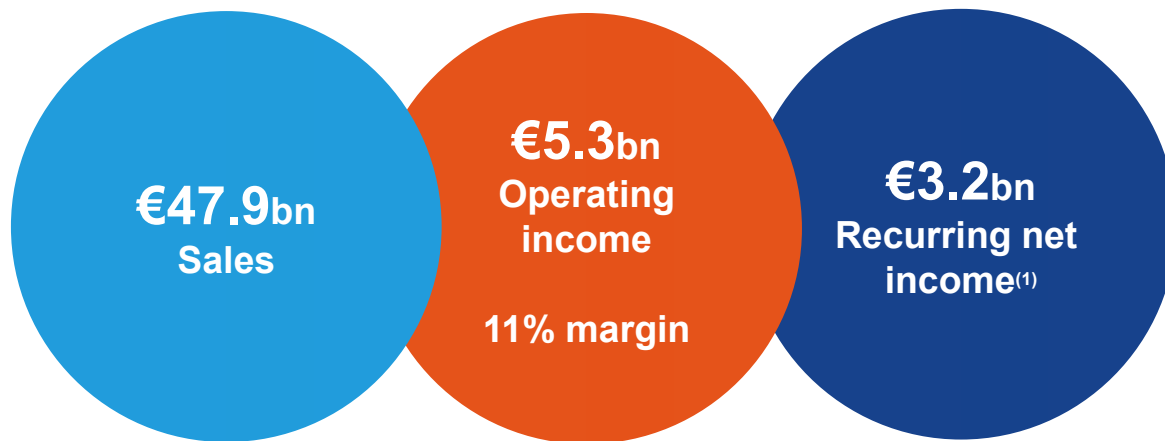
Esther Soriano Hoyuelos
General Manager Saint-Gobain Solutions, Spain

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WITH REMARKABLE FINANTIAL PERFORMANCE

FINANTIAL RESULTS 2023



Free cash flow⁽²⁾
€3.9bn



Capital expenditure⁽³⁾
€2.0bn





INDUSTRY
 Isover SAINT-GOBAIN
 weber SAINT-GOBAIN

SAINT-GOBAIN AT A GLANCE

WITH A COMPLETE PORTFOLIO OF BUILDING SOLUTIONS



INNOVATE ON OUR PROCESSES: LEVERAGE OUR UNIQUE GREEN INNOVATION CAPABILITIES



Scope 1 & 2

Short Term



Industry 4.0

- **Deploy widely 4.0 technology** including sensors and data acquisition tools
- Leverage data collected to streamline and optimize processes



Recycling

- Accelerate on **material disposal locations** for our customers in our distribution outlets
- Improve our **product design** to facilitate recycling
- Adapt our **production processes** to accommodate higher proportion of recycled content

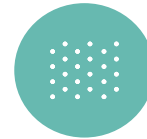
Medium and Long Term



Raw material reduction



Accelerate on **light products**



Substitute **with low carbon alternatives** keeping same mix



Accelerate on **recycled content**



Rethink our **formulations or processes**



Carbon Capture

- **Develop** CCU¹ technologies to be integrated in our production processes
- **Validate technical solutions**, gradually deploy them across industrial footprint

Cleantech at the core of our innovation and R&D

SUPPLIERS & LOGISTICS: TACKLE EMISSIONS IN SUPPLIERS & TRANSPORT



Scope 3

Engage all our suppliers

Levers

- Responsible purchasing charter
- SBT approach adoption
- Data transparency
- Benchmarking, selection criteria

Key actions



Benchmark suppliers, select them taking into account CO₂ emissions



89% of non-trade suppliers & **86%** of trade suppliers covered by Supplier charter



Gather detailed CO₂ emissions and other sustainability **data** (questionnaires, common approach + testing)



Engage large emitters to adopt **SBT** approach (focus on cement, soda ash, paper, distribution suppliers)

Reduce emissions from transport

Levers

- Optimize logistics
- Improve fuel efficiency
- Use decarbonized fuels
- Replace road by rail & water

Examples of key actions



Fret21: part of COP21, to push carriers to cut CO₂ emissions



Evoluvert: NGV¹-fueled trucks in Point.P distribution centers



Control Tower: truck filling rate monitor, route optimization in LATAM

Leverage our impact on the value chain

1. Natural Gas Vehicle

WE PLACE CORPORATE SOCIAL RESPONSIBILITY AT THE HEART OF OUR BUSINESS MODEL

OUR CSR ROADMAP



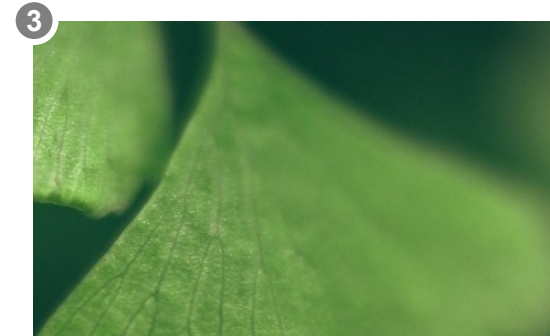
BUSINESS ETHICS

To share our values with our stakeholders to build together over the long term



HEALTH & SAFETY

Our first responsibility is to guarantee the health and safety of our employees and our stakeholders



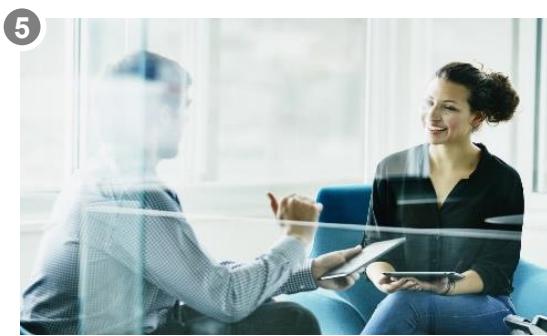
CLIMATE CHANGE

To contribute to the emergence of a low-carbon economy capable of preserving the common good



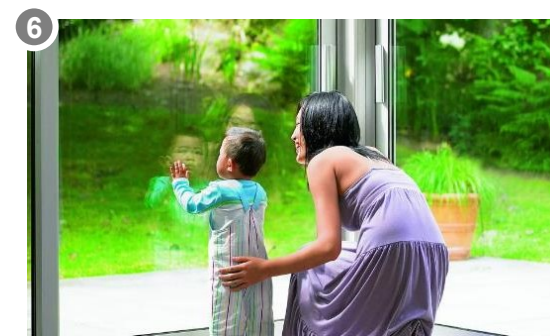
CIRCULAR ECONOMY

To change the way we design, produce and distribute our products and solutions to develop the circular economy



INCLUSION & DIVERSITY

To have broadly diverse teams to build an open and engaging corporate culture

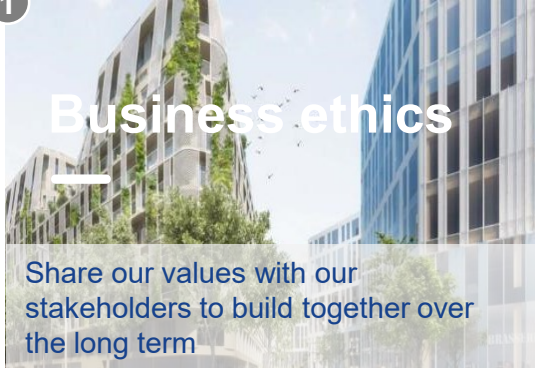


LOCAL & INCLUSIVE VALUE CREATION

To be a corporate citizen everywhere

WE ARE MAKING PROGRESS ON ALL OUR PILLARS (1/3)

1



2



Our achievements

Ethics

93% of new managers trained in Principles of Conduct & Action

Responsible purchasing

89% Non-trade suppliers covered by the supplier charter

86% Trade suppliers covered by the supplier charter

Compliance

100% of managers trained in competition law

89% of new managers trained in anti-corruption program

Health & Safety for all the employees

2.2 Total Recordable Accident Rate (TRAR)

*down from 9.9 in 2010**

Committed to reduce our TRAR below 2 by 2025

Health charter for our employees, clients, suppliers and neighbours

For and with our stakeholders

Main priority during pandemic crisis

Adapted our processes to interact safely amongst our employees, with our suppliers, welcome our customers in strict adherence to sanitary measures

WE ARE MAKING PROGRESS ON ALL OUR PILLARS (3/3)

5

Inclusion & diversity

Have broad diversity within the teams to build an open and engaging corporate culture

6

Local & inclusive value-creation

Be a corporate citizen in every country

Our achievements

Increase diversity

91.4% Global Diversity Index

24.2% women managers vs. 17.5% in 2010

17.1% women senior managers vs. 5% in 2010

Promote diversity

'Women In Network'

Be inclusive

Bloomberg Gender-Equality Index

New diversity objective

30% Women on average on all our business ExCos by 2025

For and with our employees

78% Employees responding to satisfaction survey

79.1% Employees received training in 2019

9% of shares held by employees through PEG¹

With local communities as recognized trusted local partner

More than 65,000 beneficiaries of the Saint-Gobain Foundation programs in 15 countries

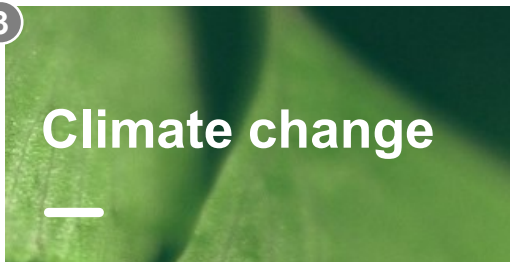
For and with the families of our employees



Social protection program launched for all the employees and their families

WE ARE MAKING PROGRESS ON ALL OUR PILLARS (2/3)

3



Climate change

Contribute to the emergence of a low-carbon economy capable of preserving the common good

4



Circular economy

Change the way we design, produce and distribute our products, solutions to develop the circular economy

Our achievements

Products & Solutions contributing

Largest EPD¹ issuer: 1,300+ verified EPD
in >31 countries; Best-in-class

Operations & supply chain

-14.5% CO₂ emissions (scope 1 + 2)
vs. 2010 at iso-production

New objectives from our 2030 roadmap

-50% Industrial water withdrawal, with no discharge in drought areas *vs. 2017*

100% Life Cycle Analyses for 100% of Group product ranges

-33%
Scope 1 + 2

-16%
Scope 3

SBT-approved vs. 2017 emissions on an absolute basis

Integrate recycled materials in our products and solutions, adapt manufacturing processes

8.5Mt Virgin raw materials avoided in 2019

11.5% Reduction of non-recovered waste *vs. 2010*

Create collection networks / services to upcycle wastes

120 Collection points in our distribution network

New objectives from our 2030 roadmap

+30%
Avoided virgin raw materials

vs. 2017

-80%
Non-recovered waste

vs. 2017

100%
Recyclable packaging

>30%
Recycled or bio-sourced content on packaging

CONCLUSION: SAINT-GOBAIN, AN ESG LEADER

Environmental

- **A key solution provider** for energy efficiency and lower carbon alternatives
- **Net-zero Carbon** by 2050, with 2030 targets: -33% scope 1+2, -16% scope 3
- **Circular economy:** +30% avoided virgin raw materials by 2030 by further increase in recycled content; -80% non recovered waste; 100% recyclable packaging; >30% recycled or bio-sourced content on packaging

Social

- **Safety:** accident reduction
- **Social Protection program:** 'CARE by Saint-Gobain'
- **Diversity:** 30% women on average on all our business ExCos by 2025
- **Business Ethics training:** for 100% new managers in first year
- **Social dialogue:** 1,437 social agreements in 2019
- **Foundation:** 40 projects sponsored in 15 countries; more than 65,000 beneficiaries of the Foundation programs

Governance

- **Independent directors:** 73% of the board & Lead Independent Director
- **Diversity:** 45% women on Board
- **2 employee directors** on Board and one representative of the employees shareholders
- **Management compensation includes ESG objectives**
- **Corporate Social Responsibility Board Committee**
- **Specific training for board members:** climate change, circular economy, biodiversity



THANKS!

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