

# IPHA 2016 BUDAPEST 21<sup>ST</sup> ANNUAL CONFERENCE

JÜRIG SCHLUMPF  
SIKASERVICES AG / TARGET MARKET CONCRETE

# CONCRETE DURABILITY

## SPEAKER

- **Jürg Schlumpf (Smurf)**  
Swiss; 52 years old; married; two children 20 & 22 years old
- **Education**  
Technical Draftsman, Construction Builder (Mason),  
Civil Engineer HTL, Marketing Planer FH
- **Actual position (23 years with Sika)**  
Corporate Target Market Manager Concrete
- **Highlights**

I want to thank you all that you have Sika  
accepted as an Associate Member in the IPHA



WE  
ARE  
SIKA

BUILDING TRUST



# WHAT WE DO

## BUILDING TRUST

Sika is a specialty chemicals company with a leading position in the development and production of systems and products for bonding, sealing, damping, reinforcing, and protecting in the building sector and the motor vehicle industry.



### SIKA AT A GLANCE

17,000+	TEAM MEMBERS
90+	COUNTRIES
160+	FACTORIES WORLDWIDE
9	NEW FACTORIES IN 2015
3	NEW SUBSIDERIES IN 2015
5	ACQUISITIONS IN 2015
5.48 BN	NET SALES IN 2015

### WE ARE THERE

Our products might not always be visible but the results they achieve are clear to see.

# SIKA IS ACTIVE IN ATTRACTIVE MARKETS WITH CORE COMPETENCIES IN BONDING, SEALING, DAMPING, REINFORCING AND PROTECTING



Concrete



Waterproofing



Roofing



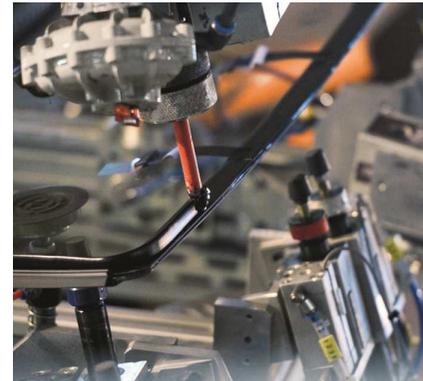
Flooring & Coating



Sealing & Bonding



Refurbishment



Industry



**CONCRETE**

## WHEN AN ENTIRE VALLEY CAN RELY ON THE STRENGTH OF THE CONCRETE.

Sika develops and markets numerous admixtures and additives for use in concrete, cement and mortar production. These products enhance specific properties of the fresh or hardened concrete, such as workability, watertightness, durability, or early and final strength

### TOP BRANDS IN CONCRETE

**Sika® ViscoCrete®**

**Sikament®**

**Sika® Plastiment®**

**Sikaplast®**

**Sika® Plastocrete®**

**Sika® Sigunit®**

**SikaGrind®**

**Sika ViscoFlow®**

**SikaPaver®**

**SikaRapid®**

### MAIN APPLICATION AREAS

**Ready mix concrete companies**

**Infrastructure projects**

**Precast element manufacturers**

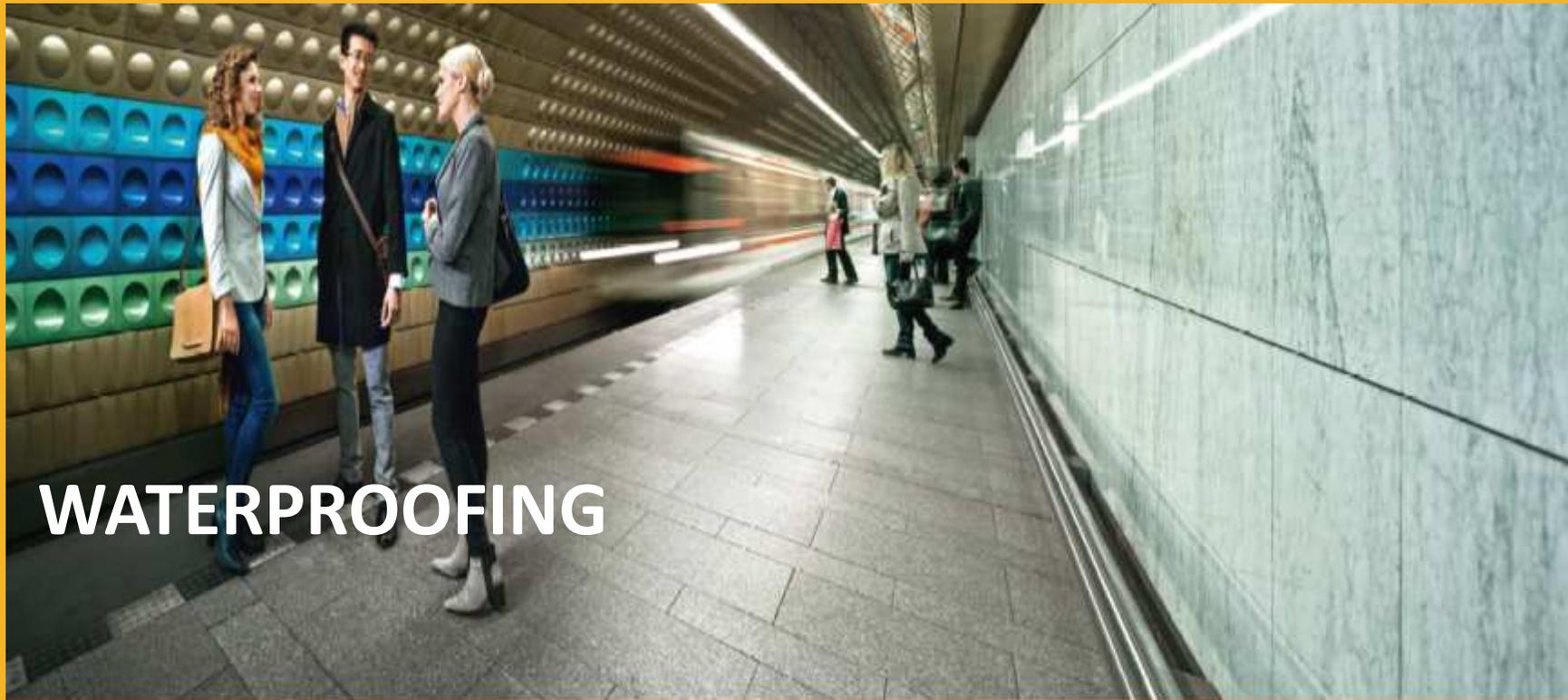
**Dry Mortar plants**

**Cement industry**

**Gypsum board production**

**BUILDING TRUST**





# WATERPROOFING

Sika's solutions cover the full range of technologies used for below-ground waterproofing: flexible membrane systems, liquid applied membranes, waterproofing admixtures for mortars, joint sealants, waterproofing mortars, injection grouts and coatings.

## TOP BRANDS IN WATERPROOFING

**Sikoplan®**  
**SikaProof®**  
**Sikadur-Combiflex®**  
**Sika Waterbar®**  
**Sika® Injection**  
**SikaTop®**  
**Sika® -1**  
**SikaFuko®**  
**SikaSwell®**

## MAIN APPLICATION AREAS

**Basements**  
**Tunnels**  
**Bridges**  
**Water and wastewater tanks**  
**Pits and ponds**  
**Dams and hydraulic structures**

BUILDING TRUST





## ROOFING

# WHEN ROOFING SYSTEMS MAKE NEW WAYS OF LIVING POSSIBLE.

Sika provides a full range of single-ply and built-up flat roofing systems incorporating both flexible sheet and liquid applied membranes. Demand in this segment is driven by the need for eco-friendly, energy-saving solutions such as green roof systems, cool roofs and solar roofs.

### TOP BRANDS IN ROOFING

**Sarnafil®**  
**Sikaplan®**  
**Sikalastic®**  
**SikaFill®**  
**Sarnacol®**  
**Sarnatherm®**  
**Sarnamatic®**  
**Sikatherm®**

### MAIN APPLICATION AREAS

**Exposed roofs**  
**Liquid applied membranes**  
**Gravel ballasted roofs**  
**Utility roof decks**  
**Green roof systems**  
**Cool roofs**  
**Solar roofs**  
**Special roof design**

BUILDING TRUST





## FLOORING

# WHEN FLOORS PERFORM AS EFFECTIVELY AS THE STAFF.

Sika's flooring solutions are based on synthetic resin and cementitious systems for industrial and commercial buildings, for example pharmaceutical and food-sector production plants, public buildings such as educational and healthcare facilities, parking decks and private residences.

### TOP BRANDS IN FLOORING

**Sikafloor®**  
**Sikalastic®**  
**Sika® Level**  
**Sika® Permacor®**  
**Sika® Unitherm**  
**SikaCor®**

### MAIN APPLICATION AREAS

**Car park floors**  
**Production facilities**  
**Cleanroom floors**  
**Fire/corrosion protection**  
**Walls and ceilings**  
**Tank linings**  
**Commercial, public and residential**

BUILDING TRUST





## SEALING & BONDING

# WHEN JOINTS CAN HANDLE ANY AMOUNT OF WATER.

Sika's wide-ranging portfolio includes top-class elastic sealing and bonding solutions to meet all job site needs, for example joint sealants for floor and special joints as well as multipurpose bonding solutions for interior finishing or parquet and soft floor covering installations.

### TOP BRANDS IN SEALING & BONDING

**Sikaflex®**  
**SikaBond®**  
**SikaHyflex®**  
**Sikasil®**  
**Sika MaxTack®**  
**Sikacryl®**  
**Sika Boom®**  
**Sika® MultiSeal**

### MAIN APPLICATION AREAS

**Building envelope solutions**  
**Civil engineering and floor joints**  
**Floor covering solutions**  
**Interior finishing**  
**Universal bonding**

BUILDING TRUST





## WHEN THOUSANDS OF PEOPLE CAN TRUST RELIABLE MAINTENANCE.

This segment features concrete protection and repair solutions, for example repair mortars, protective coatings, grouts and structural strengthening systems. It also includes products for interior finishing, such as leveling compounds, tile adhesives and grouts.

### TOP BRANDS IN REFURBISHMENT

**Sikadur®**  
**SikaGrout®**  
**Sikagard®**  
**Sika MonoTop®**  
**Sika Top®**  
**SikaCeram®**  
**Sika AnchorFix®**  
**SikaRep®**  
**Sika® CarboDur®**  
**Sika® FerroGard®**

### MAIN APPLICATION AREAS

**Concrete repair**  
**Concrete protection**  
**Hydrophobic impregnation**  
**Structural bonding**  
**Structural strengthening**  
**Grouting**  
**Anchoring**  
**Tile adhesives and grout**

**BUILDING TRUST**





## INDUSTRY

# WHEN ADHESIVES MAKE CARS LIGHTER AND SAFER.

The markets served by Sika include automobile construction, the commercial vehicle industry (structural bonding, direct glazing, acoustic systems, reinforcing systems), automotive aftermarket (auto glass replacement, car body repair), renewable energies (solar and wind), and facade engineering.

### TOP BRANDS IN INDUSTRY

**Sikaflex®**  
**SikaBaffle®**  
**SikaTack®**  
**SikaPower®**  
**SikaForce®**  
**SikaReinforcer®**  
**SikaMelt®**  
**SikaSeal®**  
**SikaDamp®**  
**Sikasil®**  
**SikaBlock®**

### MAIN APPLICATION AREAS

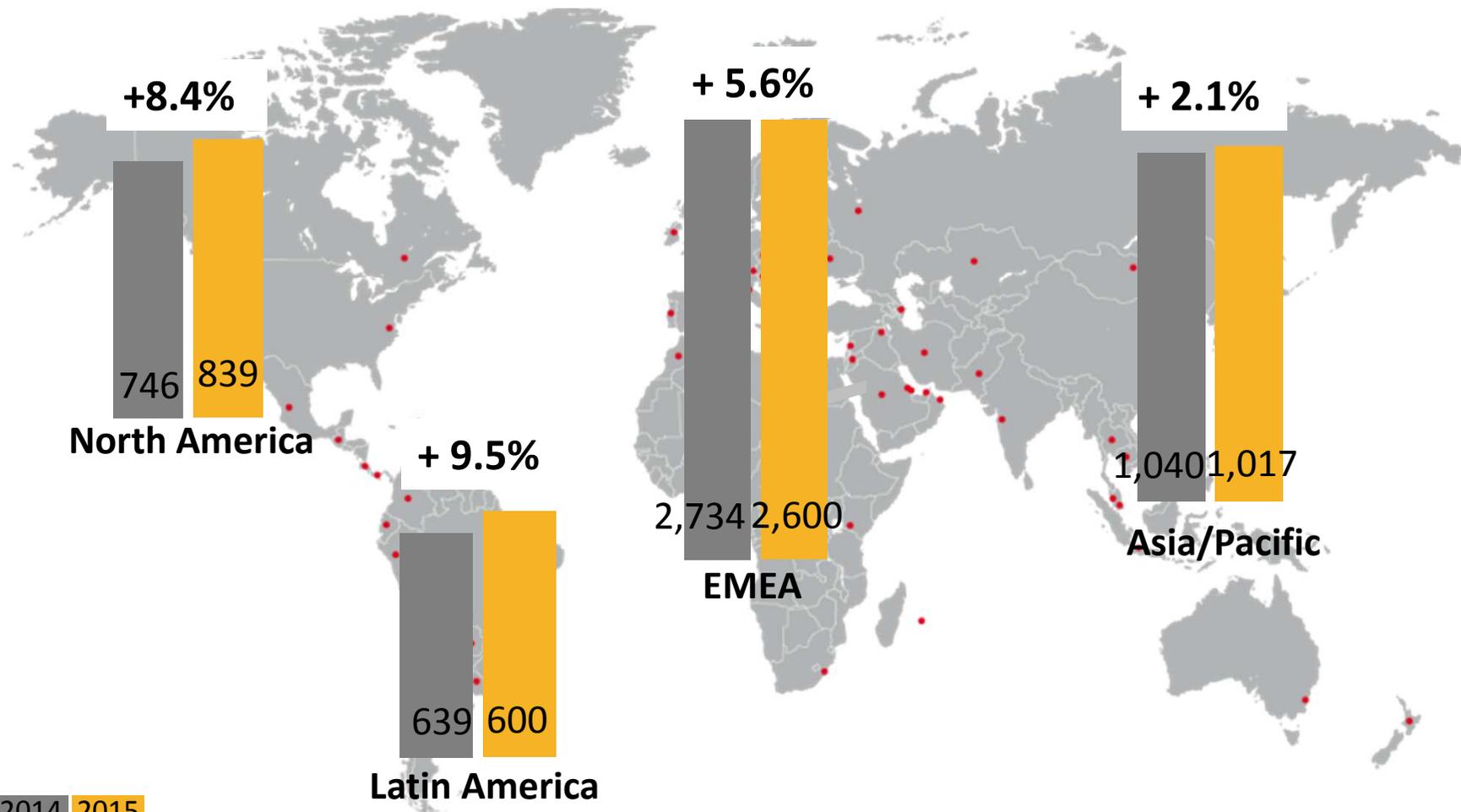
**Automotive OEM and OES**  
**Automotive aftermarket**  
**Commercial vehicle industry**  
**Facade and fenestration manufacture**  
**Sandwich panels**  
**Renewable energy industry**  
**Marine industry**  
**Tooling and composites**

**BUILDING TRUST**



# 6.2% SALES GROWTH FOR 2015

## SALES GROWTH IN ALL REGIONS



2014 2015  
(in CHF mn,  
Growth in LC)

# KEY FIGURES

## RECORD RESULTS

In million CHF	2014	2015	Δ %
<b>Net sales</b>	<b>5,571.3</b>	<b>5,489.2</b>	<b>- 1.5%</b>
Gross results as % of net sales	53.0	54.1	
EBITDA	798.3	837.3	+ 4.9%
<b>EBIT</b>	<b>633.2</b>	<b>673.3</b>	<b>+ 6.3%</b>
Net profit	441.2	465.1	+ 5.4%
<b>Operating free cash flow</b>	<b>417.5</b>	<b>451.5</b>	<b>+ 8.1%</b>
ROCE in %	23.3	24.3	

# FIRST QUARTER SALES AND OUTLOOK 2016

## STRONG START TO THE YEAR WITH 8.3% SALES GROWTH

- +8.3% sales growth in local currency to CHF 1,274.4 million
- All regions with growth; double-digit sales increase in Colombia, Argentina, North America, Southeast Asia, Pacific, Africa, Middle East and our industrial business
- More stable exchange-rate situation with modest currency impact (-1.7%) and very good sales growth in Swiss francs of 6.6%
- Continued positive margin trend
- Opening of 94th national subsidiary in Kuwait
- 4 new factories in Greece, Myanmar, Cambodia and Canada
- Acquisition of L.M. Scofield in the USA

### Outlook:

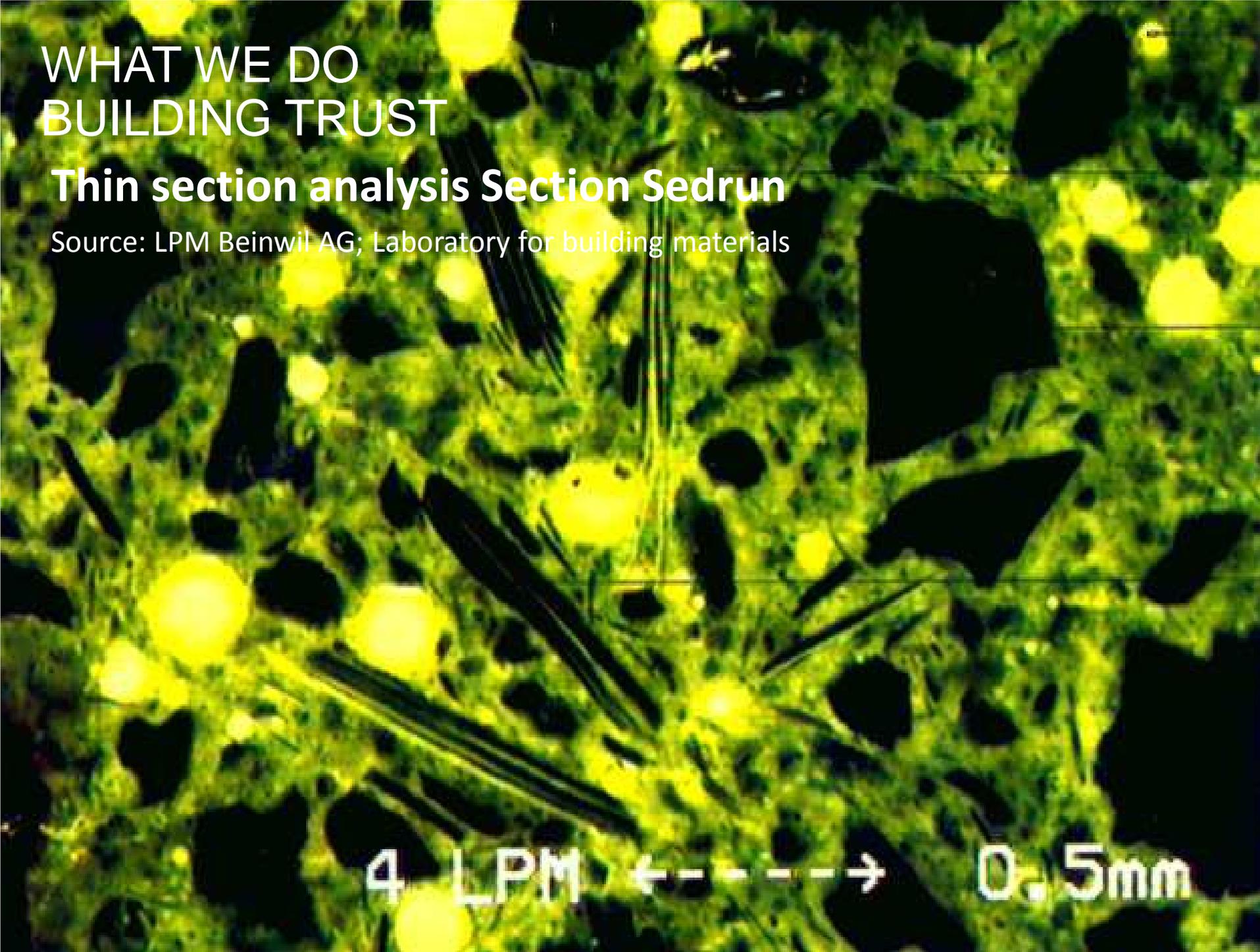
- Confirmation of 2016 annual targets: 6-8% sales growth and above-average rise in margins
- Opening of 6 to 8 new factories and 3 to 4 national subsidiaries planned

# WHAT WE DO BUILDING TRUST

## Thin section analysis Section Sedrun

Source: LPM Beinwil AG; Laboratory for building materials

4 LPM ←-----→ 0.5mm



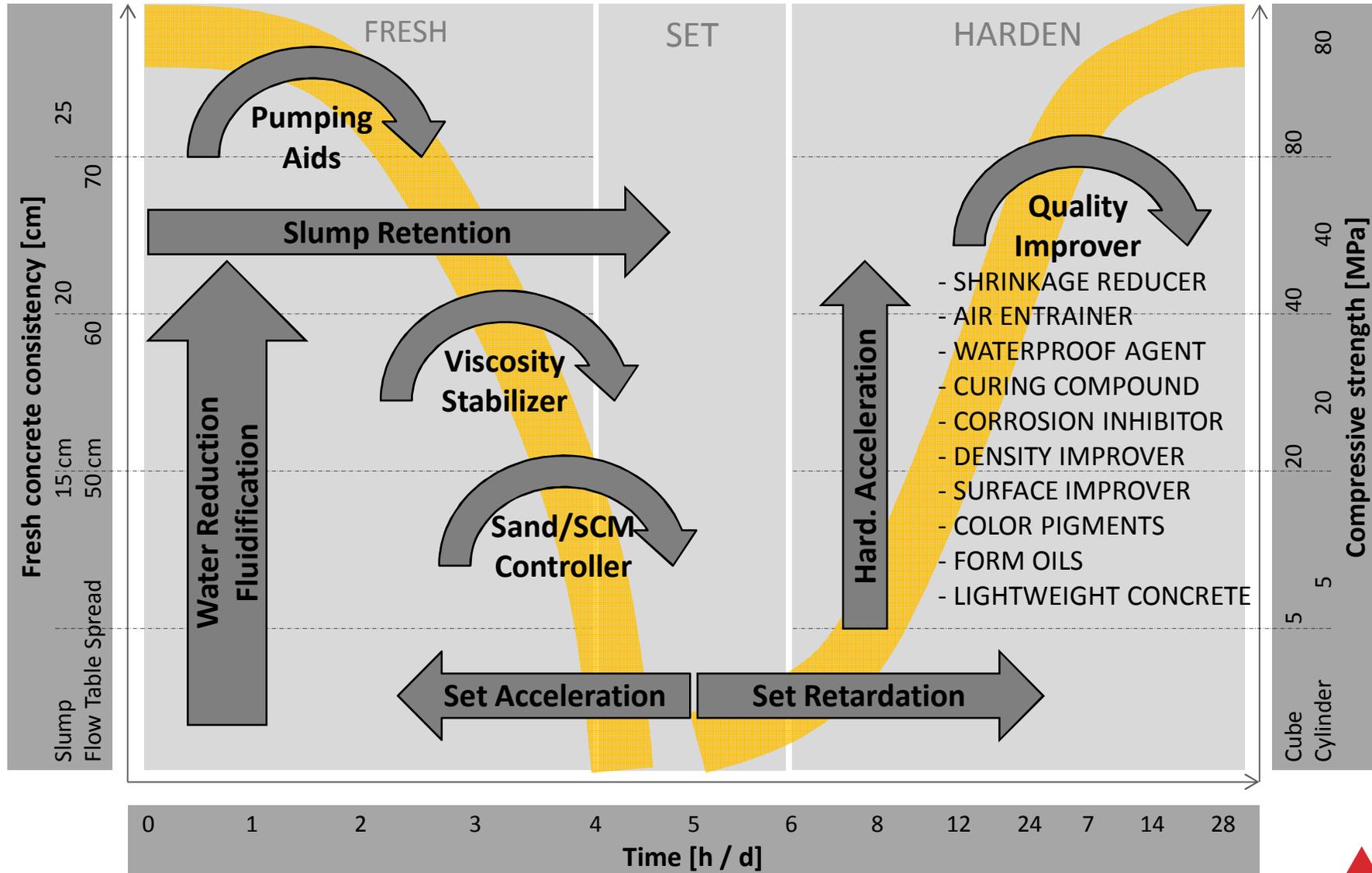
# WHAT WE DO

## BUILDING TRUST



# INNOVATIVE CONCRETE TECHNOLOGY

## FULL RANGE ADMIXTURES



# IPHA 2016 BUDAPEST

## EXPECTATION FROM IPHA MEMEBRSHIP

### ■ High Rise Buildings in Japan

Requirement: > 200 Mpa in compressive strength  
Solution: 900 kg/m<sup>3</sup> OPC&SF / 225 kg/m<sup>3</sup> FA / w/c-ratio: 0.12  
Sika Technologies: ViscoFlow USK / SikaFume / SikaTard / Sika MixDesign

### ■ Metro Doha in Qatar

Requirement: > 130 Years of service life  
Solution: 65% GGBFS / 30% OPC / 5% SF / w/c-ratio: 0.38  
Sika Technologies: ViscoCrete HRWR / SikaRapid / SikaFiber / Sika MixDesign

### ■ Prestressed Hollow Core Concrete Elements

Requirement: Viscosity for extrusion process / green strength / high early strength / Surface aspect / steel wire bonding in the matrix / low w/c / MRA's / Grouting / AEA ?

➤ **Gain a professional understanding about the real needs of your highly specialized industry to develop customized solutions for this industry!**



THANK YOU FOR YOUR ATTENTION  
AND ENJOY YOUR STAY IN BUDAPEST