Industrial Coatings from PPG

Presenter Name or Date

PPG is a global maker of paints, coatings and specialty materials

- Founded in **1883**
- Headquartered in **Pittsburgh, PA**
- **45,000+** Employees
- Facilities in **70+** countries

We are a recognized leader in…

- Sustainability
- Innovation
- Color

Two product segments drive our $15.1B business*

Performance Coatings: 60%

Aerospace

Architectural Coatings**

Automotive Refinish Coatings

Protective and Marine Coatings

Industrial Coatings: 40%

Automotive OEM Coatings

Industrial Coatings

Packaging Coatings

Specialty Coatings and Materials

* 2019 revenue ** Includes Architectural Coatings (Americas and Asia Pacific) and Architectural Coatings (Europe, Middle East and Africa)

We deliver value beyond the surface

Your priorities:	Differentiated Products	Manufacturing Performance	Ease of Doing Business	Value Chain Support	Long-Term Partnership
	Color, durability, functionality	Cost, application, sustainability	Reliability, flexibility, globality	Approvals, relationships, insight	Innovation, solutions, trust
PPG offers:	Global leader in coatings R&D Full-technology portfolio of products Color styling, design and matching	Line optimization and cost savings Application expertise and robust platforms Environmentally responsible solutions	Secure Launch, customized conversion plans Supportive commercial partnerships Global and regional service and delivery	OEM-tier approval coordination Customer and supplier networks Market relationships and intelligence	Co-development and trend prediction Solutions beyond coatings Ethical standards and integrity

A global R&D leader

PPG coatings innovation center
Allison Park, PA

Core activities
Synthesis, Formulation, Application, Analytical capability

$470MM
Average investment annually over the last 4 years in R&D

250+ researchers focused on developing market-changing coatings technology

500+ patents in past 10 years

Greater investment in R&D than any other coatings company

Impacting the communities around us:

The COLORFUL COMMUNITIES™ Program

98 repainting and restoration projects in 33 countries

4100 employee volunteers

$11.8MM+ in PPG giving

1.3MM individuals impacted

8,000 gallons of PPG paint products used

Our 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.

We are committed to sustainability

2025 Goals

2025 Goals	2019 Progress
40% of sales from sustainable products and processes by 2025	**33%** of sales
25% reduction in total waste disposal intensity by 2025 from a 2017 baseline	**5.6%** reduction from 2017
Reduce GHG emissions intensity by **15%** measured in total tons discharged by 2025 from a 2017 baseline	**4%** reduction from 2017
65% per year improvement in our spills and releases rate by 2025 from a 2017 baseline	**32%** improvement from 2017
On our path to zero injuries, we achieve an improvement of at least **5%** per year in our injury and illness rate	**10.3% below 2017 rate**
Implement wellness programs at **100%** of PPG facilities globally by 2025	**70%** of locations with 50+ employees had a wellness program in 2018
Invest at least **$10 million** by 2025 through the COLORFUL COMMUNITIES™ initiative	**$5.75** million invested through 2018

We believe in the value of a diverse workforce

> Our global workforce comprises a wide variety of cultures, languages, nationalities, religions, ethnicities, and professional and educational backgrounds across an array of business units and geographic locations. A rich blend of perspectives and experiences is requisite to understanding and serving our customers' needs, resolving the challenges that lie ahead of us, and ensuring that we continue to be successful and grow.

Michael McGarry
Chairman & Chief Executive Officer

An industry leader in Environmental Health and Safety standards

We are committed to:

Designing, building and operating in ways that:

- Make a **positive contribution** to the surrounding community and society
- **Prevent harm** to employees, public health and the environment
- **Conserve** energy, water and raw materials
- Integrate pollution **prevention**

Implementing initiatives to improve employee safety, health and well-being, reducing injury and illness rates

Creating **global processes** to track new regulations and emerging issues

Did you know?

PPG paints and coatings are used to protect and enhance some of the world's best-known products, landmarks and brands…

The skylines we see

The devices that connect us

The pans we use to cook

The offices where we work

The cars we drive

The homes in which we live

Industrial Coatings

We are proud to serve these primary markets…

Transportation

Automotive Parts and Accessories

Heavy Duty Equipment

Wheel

Coil Coatings

Extrusion Coatings

Interior Building Products

Consumer Electronics

Kitchenware and Industrial Bakeware

Appliance

General Industrial

Office Furniture and Equipment

We are one of the few suppliers offering products and capabilities in every major coatings technology

Pretreatment

A complete line of pre-treatment products and a variety of other solutions that strengthen, protect and enhance the production and presentation of products.

PPG ZIRCOBOND®
Zircobond pretreatment products cut sludge by-product from the pretreatment process by at least 80 percent compared to zinc-phosphate-based products. As an added benefit, Zircobond can be used in existing pretreatment lines.

PPG X-BOND®
X-Bond zirconium-based, thin-film pretreatment system prepares steel, galvanized steel and aluminum substrates for optimum paint adhesion. With performance equivalent to that of iron phosphates, it provides excellent corrosion resistance and is compatible with low application temperatures.

PPG VERSABOND®
Versabond is a fast, kinetic-efficient zinc-phosphate pretreatment system that improves corrosion resistance on mixed-metal substrates while enabling manufacturers to realize the benefits of extended bath life, reduced sludge and lower processing temperatures.

Electrocoat

As a pioneer and global leader in this technology, PPG offers a comprehensive mix of anodic and cathodic products in epoxy, acrylic and other formulations.

PPG POWERCRON® ADVANTAGE
Specifically engineered to provide high-edge protection of cut, stamped or formed edges on complex metal parts. Cure temperatures as low as 320°F (160°C) can help manufacturers reduce energy costs and related carbon emissions.

PPG FRAMECOAT® II
PPG's high-performance cationic epoxy electrocoat technology that provides excellent edge coverage with the added benefit of an improved surface profile. Formulated without lead, it is a state-of-the-art electrodeposition primer formulated to deliver improved corrosion resistance for automotive parts and light-truck chassis components.

PPG ELECTROPOLYSEAL®
Designed specifically for bulk applications, this system offers excellent corrosion protection, outstanding adhesion and precise torque control in a range of performance options. A perfect fit for fasteners and other small parts, Electropolyseal e-coat does not fill recessed heads or threads.

Liquid Coatings

Our liquid coatings technology provides exceptional durability and appearance, delivering a complete line of alkyds, urethanes, epoxies and acrylics.

PPG SPECTRACRON VRP Liquid®
A very robust platform, Spectracron VRP 2K epoxy primer provides corrosion protection over a variety of substrates and conditions. Available in a variety of colors, this technology allows for flexible and efficient OEM application on an assortment of substrates.

PPG DURANAR®
Duranar liquid extrusion and coil coatings are available in a vibrant palette of solid, metallic and mica formulations that add exceptional durability to architectural metals. One of the most trusted architectural products, these coatings have protected buildings of distinction around the world for over 50 years.

PPG SPECTRACRON® Ultra-Durable Monocoat
Spectracron UDM is a one-component carbamate acrylic coating technology designed to bring exceptional durability to the steel wheel market without having to apply a clearcoat. This coating is available in solid and metallic colors with a wide gloss range for customizable finishes.

Powder Coatings

PPG's comprehensive mix of acrylic, epoxy, polyester, epoxy polyester hybrid and urethane coatings can answer virtually any application challenge.

PPG ENVIROCRON® EXTREME PROTECTION EDGE
Delivers extreme corrosion protection on sharp, hard-to-coat edges in just one coat. With a higher first-pass transfer efficiency, reduced powder usage and 20+ micron edge coverage, this patent-pending breakthrough is ideal for laser, fiber, CO2 plasma cut and sharp edges, louvers, blades and mesh.

PPG ENVIROCRON® HIGH TRANSFER EFFICIENCY (HTE)
Envirocron HTE powder is ideal for complex, difficult-to-coat surfaces. Available in durable and ultra-durable proprietary formulations, this innovation helps to increase output while reducing material usage, energy consumption and maintenance costs with first-pass transfer rates of up to 85 percent.

PPG CORAFLON PLATINUM (AAMA 2605)®
Coraflon Platinum fluoropolymer powder combines the benefits of one-coat capability with high gloss, outstanding color retention and resistance to chalking and abrasions. It is ideal for monumental buildings, doors, window frames and railings.

Outsourcing solutions for every major coatings technology

PPG works with our OEM partners around the world to deliver comprehensive coating solutions.

Our flexible, innovative service offerings include:

- Equipment design and construction
- Process optimization and troubleshooting
- End-to-end coating operation management

Ensuring success with the SECURE LAUNCH EXCELLENCE™ Program

A four-phase process that accelerates the development of new coatings, colors and formulations, and transitions them quickly and seamlessly into your manufacturing processes.

Phase I
Documenting customer requirements

Phase II
Product development and application validation

Phase III
Production trial planning and execution

Phase IV
Product commercialization and production review

Global R&D labs & field labs

USCA & Latin America

Research Labs

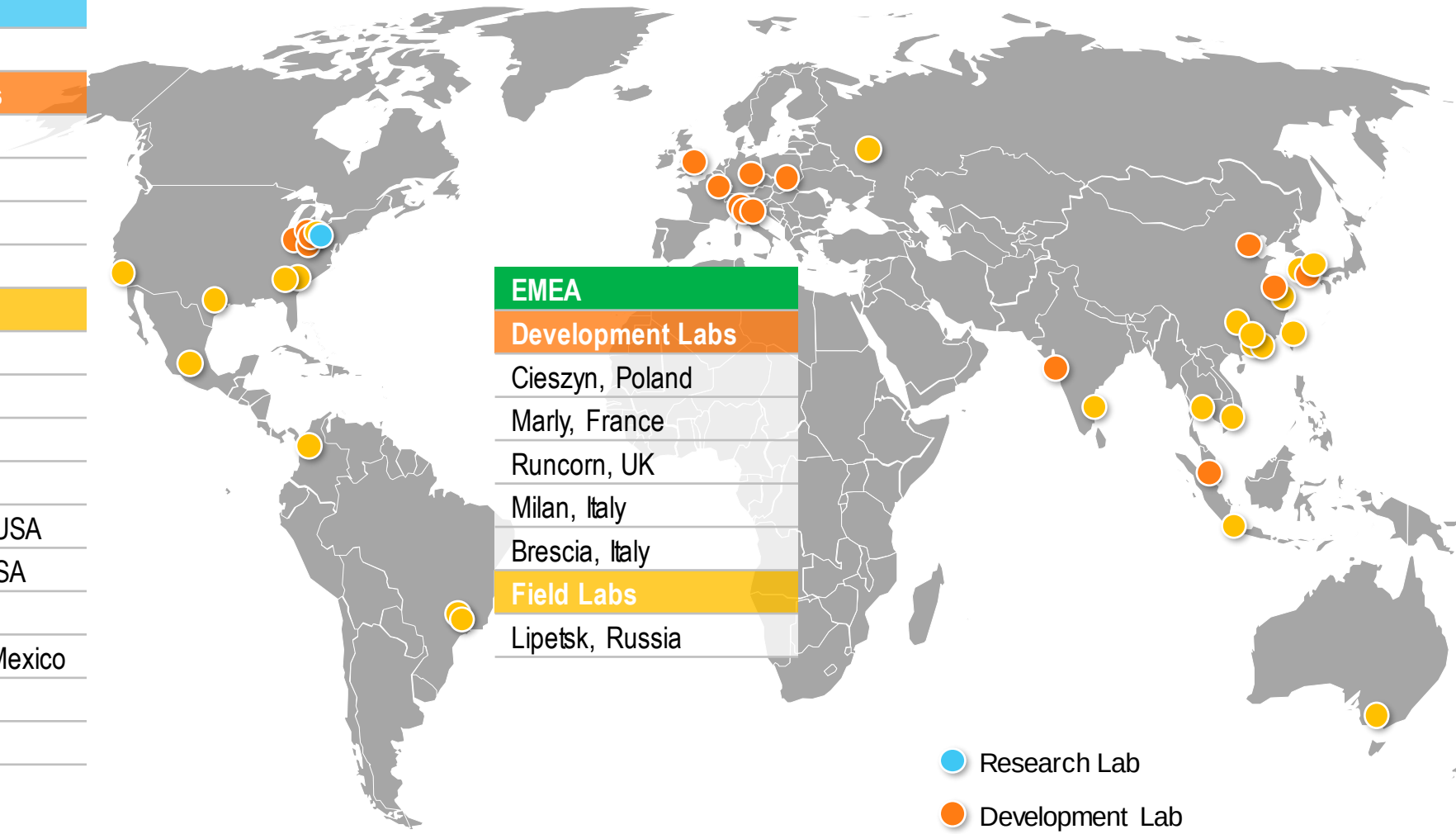
Allison Park, USA

Development Labs

Elverson, USA
Oak Creek, USA
Springdale, USA
Strongsville, USA

Field Labs

Gainesville, USA
Brazil, USA
Euclid, USA
Greensboro, USA
Huntington Beach, USA
Springdale Plant, USA
Medellin, Colombia
San Juan Del Rio, Mexico
Sumaré, Brazil
Sao Paolo, Brazil



AP

Development Labs

Ulsan, Korea
Petaling Jaya, Malaysia
Pawane, India
Suzhou, China
Tianjin, China

Field Labs

Clayton, Australia
Auckland, New Zealand
Bangplee, Thailand
Bien Hoa, Vietnam
Hanoi, Vietnam
Amata, Vietnam
Sriperumbudur, India
Bangalore, India
Suzhou Plant, China
Guangzhou, China
Nansha, China
Jakarta, Indonesia
Xiamen, China
Jiading, China
Singapore
Taoyuan, Taiwan

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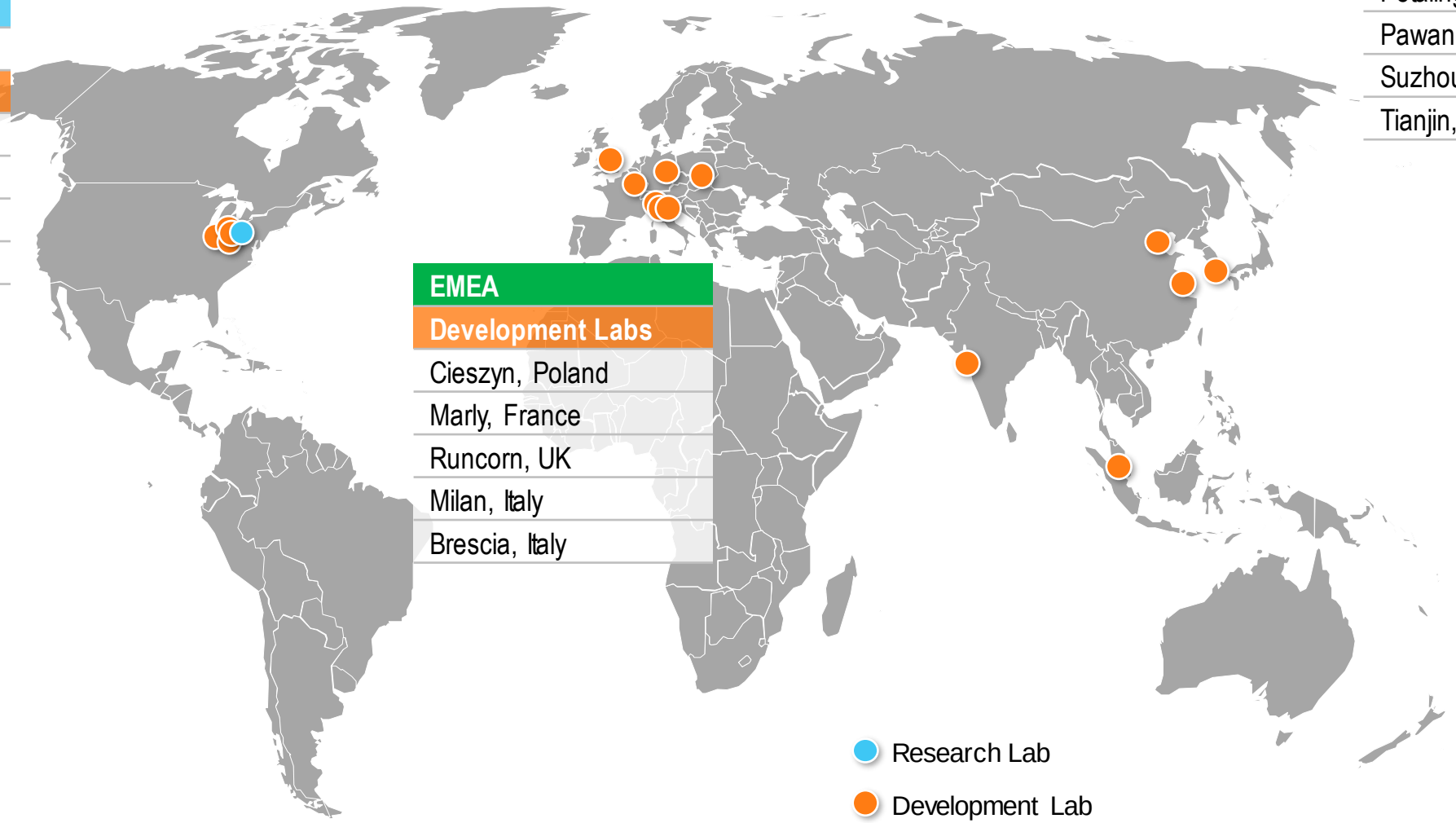


EMEA

Development Labs

Cieszyn, Poland

Marly, France

Runcorn, UK

Milan, Italy

Brescia, Italy

AP

Development Labs

Ulsan, Korea

Petaling Jaya, Malaysia

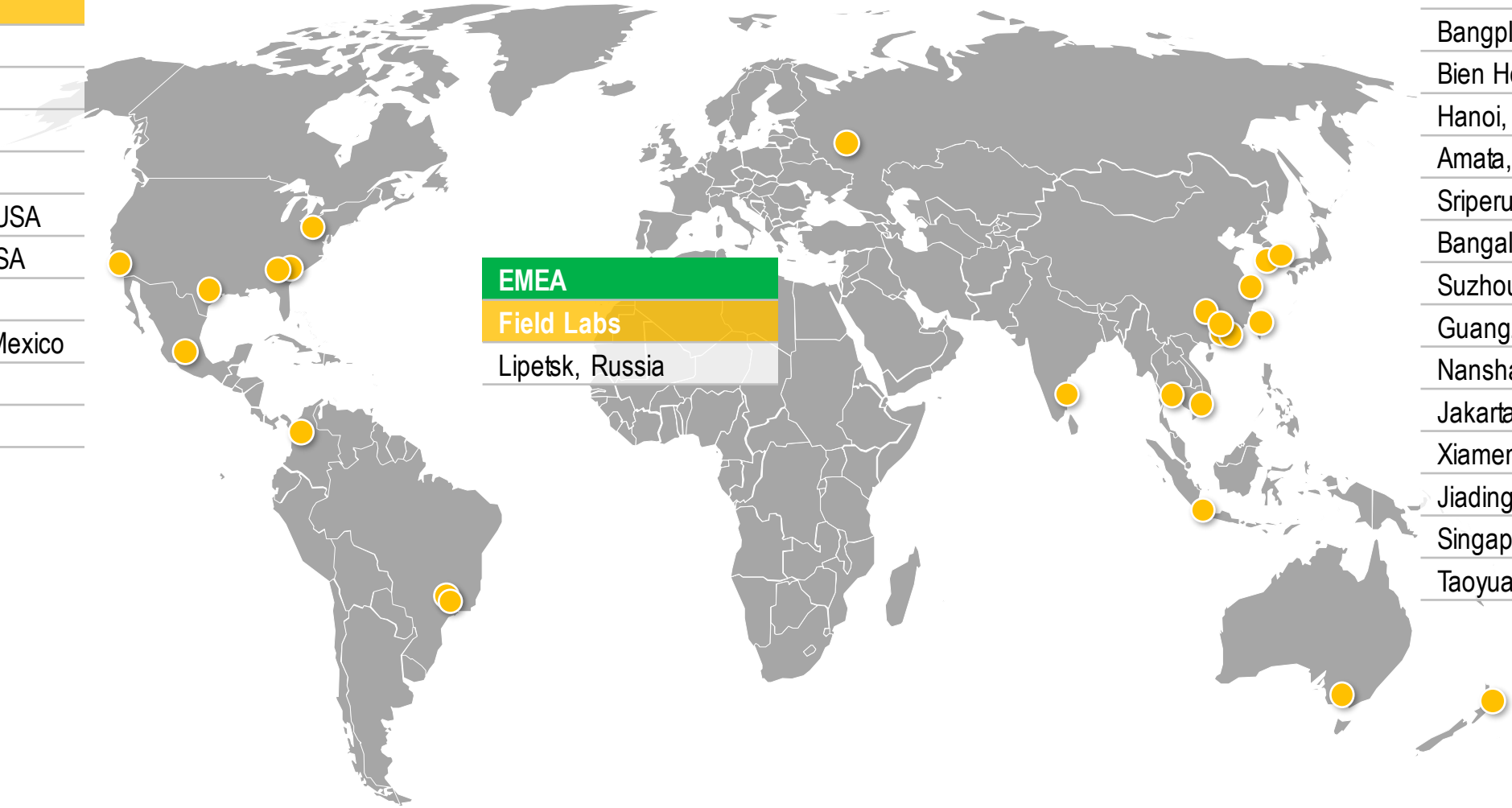
Pawane, India

Suzhou, China

Tianjin, China

Global field labs

USCA & Latin America
Field Labs
Gainesville, USA
Brazil, USA
Euclid, USA
Greensboro, USA
Huntington Beach, USA
Springdale Plant, USA
Medellin, Colombia
San Juan Del Rio, Mexico
Sumaré, Brazil
Sao Paolo, Brazil



AP
Field Labs
Clayton, Australia
Auckland, New Zealand
Bangplee, Thailand
Bien Hoa, Vietnam
Hanoi, Vietnam
Amata, Vietnam
Sriperumbudur, India
Bangalore, India
Suzhou Plant, China
Guangzhou, China
Nansha, China
Jakarta, Indonesia
Xiamen, China
Jiading, China
Singapore
Taoyuan, Taiwan

Global manufacturing plants

USCA & Latin America
Manufacturing
Brazil, USA
Brazil, USA
Elverson, USA
Euclid, USA
Fostoria, USA
Gainesville, USA
Grand Haven, USA
Greensboro, USA
Oak Creek, USA
Springdale, USA
Strongsville, USA
West Chicago, USA
Pilar, Argentina
Americano Brasilience, Brazil
Sumaré, Brazil
Medellin, Columbia
San Jan del Rio, Mexico

EMEA
Manufacturing
Brescia, Italy
Bursa, Turkey
Cieszyn, Poland
Lipetsk, Russia
Runcorn, England
Saultain, France

AP
Manufacturing
Jiading, China
Jiangmen, China
Nansha, China
Tianjin, China
Zhangjiagang, China
Clayton, Australia
Dahej, India
Sriperumbuder, India
Petaling Jaya, Malaysia
Auckland, New Zealand
Tuas, Singapore
Busan, South Korea
Cheonan, South Korea
Ulsan, South Korea
Bangplee, Thailand
Hanoi, Vietnam
Ho Chi Minh, Vietnam

- Liquid Coatings
- Powder Coatings
- Pretreatment & Specialty Coatings
- Electrocoat
- Ultraviolet and Electrobeam
- R Resins

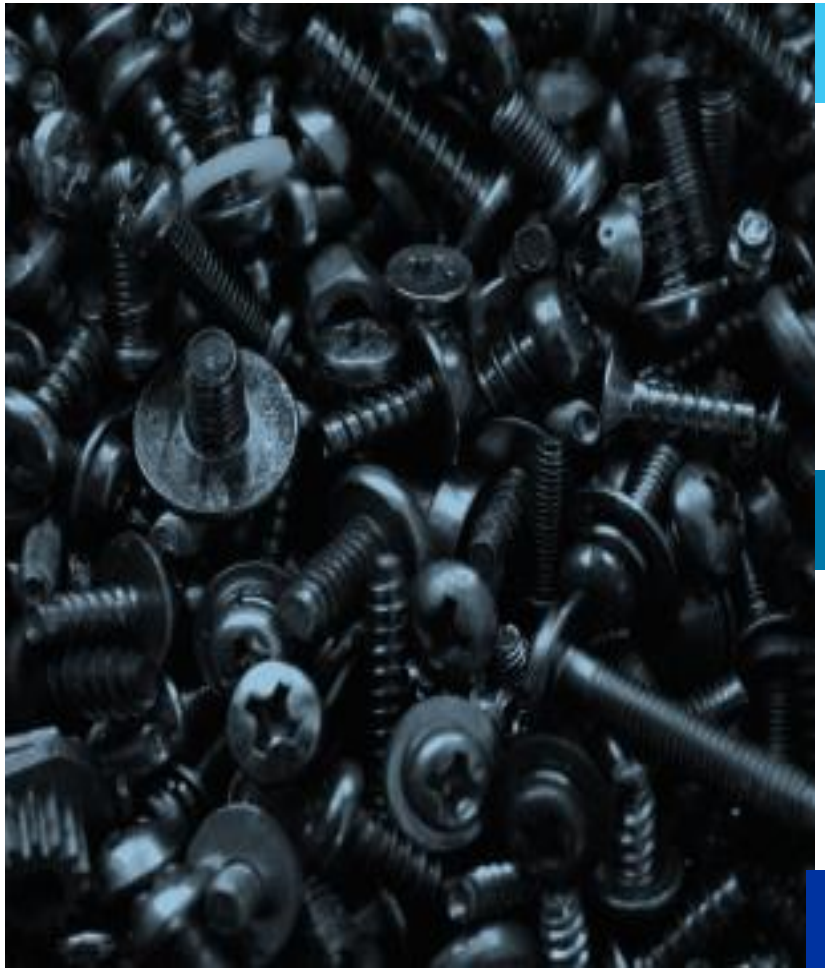
Delivering global color expertise across multiple industries

A global leader in color styling and trends, PPG defines color direction for more surfaces and across more industries than any other coatings company in the world.

Working with leading original equipment manufacturers and product designers, our color stylists and chemists offer inspiring color services that deliver the ideal shade, tone, value and saturation every time, expertly taking color from conception to the market with batch-after-batch consistency.

PPG coatings for fasteners

Technical Considerations- Construction



Performance

- Life expectancy
- Salt spray resistance
- Corrosion resistance
- Chemical resistance
- Torque precision
- No part-to-part sticking
- Chip and impact resistance
- Outstanding adhesion
- UV resistance
- Field maintenance

Design

- Coating thickness
- Color consistency and coverage
- Will not fill recesses or threads
- Extensive color palette
- Smooth/non-reflective finish option

Multi-technology/ multi & single-layer systems

- Liquid Coatings
- Powder Coatings
- Electrocoat
- Pretreatment and Engineered Products

Performance Standards- Construction

- ASTM B117: Salt Spray Resistance
- SAE J2334: Accelerated Cyclic Corrosion
- ASTM 735: Humidity Resistance
- ASTM F1136: Corrosion Protection
- ASTM B571: Coating Adhesion
- ASTM D1308-02R13: Chemical Resistance
- ISO 16047: Torque Precision
- SAE J400: Chip Resistance

Technical Considerations- Oil & Gas

Performance

- Wear life
- Salt spray resistance
- Corrosion resistance
- Chemical resistance
- Torque precision
- Mar and abrasion resistance
- Outstanding adhesion
- UV degradation
- High temperature resistance (500°F)

Design

- Coating thickness
- Color consistency and coverage
- Will not fill recesses or threads
- Extensive color palette
- Smooth/non-reflective finish option

Multi-technology / multi & single-layer systems

- Liquid Coatings
- Powder Coatings
- Electrocoat
- Pretreatment and Engineered Products

Performance Standards- Oil & Gas

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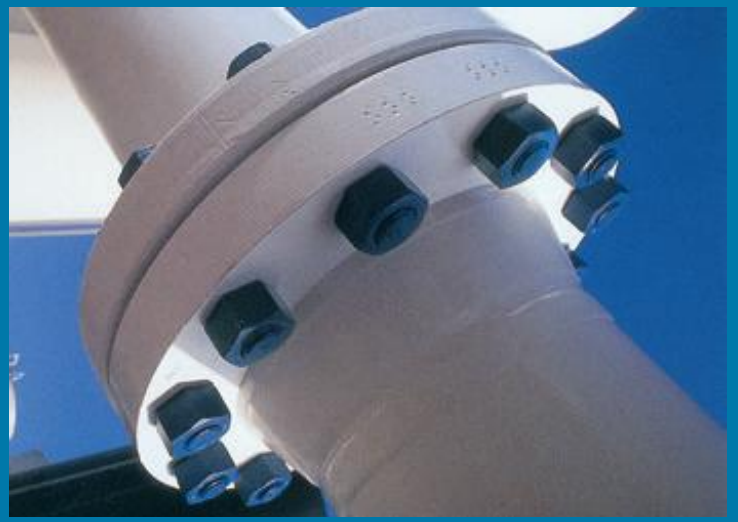
- ISO 16047: Torque Precision
- SAE J400: Chip Resistance



PPG product offering: application and system example

Coated substrates: individual layers and/or system

Coatings and Materials for:

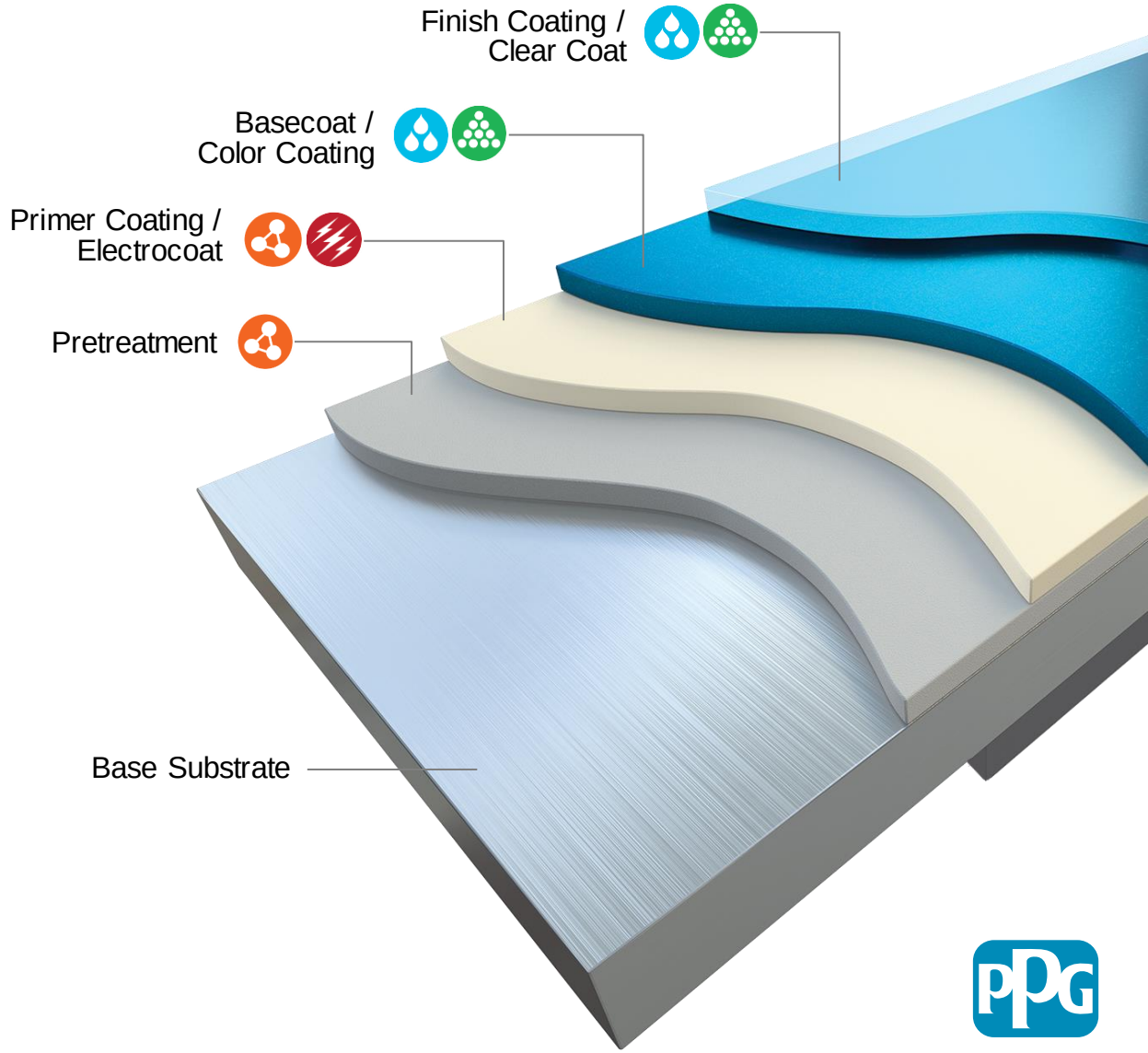
Metal
- Steel
- Aluminum
- Alloys

Non-Metal
- Plastic
- Glass
- Fiber Glass
- Concrete
- Wood
- Composites

Functionality:
- Decorative coatings
- Soft-touch coatings
- Sound insulation coatings
- Sealants and adhesives

PPG Technologies

- Liquid Coatings
- Powder Coatings
- Electrocoat
- Pretreatment and Engineered Products



ENVIROCRON®

Powder Coatings

Features	Potential Customer Benefits	Oil & Gas	Construction
Outstanding corrosion resistance (ISO 12944-6 C5-M)	Protects assets in industrial and seacoast locations (harsh environments)	✓	✓
Semi-conductive properties reduce back ionization	Improves topcoat transfer efficiency	✓	✓
Smooth profile for application of topcoat layers	Reduces rework to achieve desire appearance	✓	✓
Excellent exterior durability	Protects and maintains longevity of product color and appearance	✓	✓
Good chemical resistance	Protects surface from incidental chemical contact	✓	✓
Low cure capabilities (250°F)	Reduces energy consumption and process cost	✓	✓

The various product ratings are a distillation of existing technical information, performance testing data and internal review from experienced product experts. Products are rated in comparison to similar PPG products within the same segment or category — not to competitors' products or to similar PPG products in other segments. The technical data presented in this document is based upon information believed by PPG to be currently accurate. However, no guarantees of accuracy, comprehensiveness or performance are given or implied. Continuous improvements in coatings technology may cause future technical data to vary from what is in this document.

Availability	Technology	Coating Type	Chemistry	Substrates
USCA	Powder	Primer and Topcoat	Semi-Conductive Zinc Ultra Epoxy & Ultra durable Epoxy	Metal or Steel

Suggested Markets

- Construction
- Oil & Gas

PPG Xylan®

Liquid Coatings

Features	Potential Customer Benefits	Oil & Gas	Construction
Low friction & extreme temperature options	Provides optimum combination of low friction, wear resistance and high temperature release for component efficiency and durability	✓	
Film hardness and durability	Outstanding abrasion-resistance for better asset longevity	✓	
Mar and abrasion protection	Protects assets and increases product life span	✓	
Bright color palette	Allows for easy identification of component parts	✓	✓ Multiple coat only
Corrosion resistance	Reduces make-up and break-out torque, even after prolonged exposure to corrosive environments.	✓	✓ Multiple coat only
UV resistance	Provides stain-resistance and easy-clean capabilities		✓
Compatible with zinc phosphate pretreatment, zinc or zinc-nickel plating	Allows for incorporation into various coating systems		✓

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Availability	Technology	Coating Type	Chemistry	Substrates
USCA	Liquid	Single & Multiple Coats	PAI/PTFE, Epoxy, Silicone Polyester, Epoxy-Phenolic	Metal or Steel

Suggested Markets

- Construction
- Oil & Gas

SPECTRACRON®

Liquid Coatings

Features	Potential Customer Benefits	Oil & Gas*	Construction
Fast drying & easy application	Lowers cost and increases throughput	✓	✓
Wide color palette	Provides differentiation through color	✓	✓
Corrosion resistance	Protects assets and increases product longevity	✓	✓
Lower cure temperature available (20min at 400°F, or as low as 325°F)	Protects surfaces with high blast profiles	✓	✓
Dip tank capable	Lowers costs with higher transfer efficiency with small complex parts	✓	✓
Torque capabilities (Range: 0.15 CoF +/-0.3 to 0.20 CoF +/-0.3)	Low coefficients of friction reduce and improve the uniformity of make-up torque	✓	✓

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*Product Codes PT10005 to PT10025 not applicable to oil & gas industry

PPG Segments
Construction
Oil & Gas

Availability	Technology	Coating Type	Chemistry	Substrates
USCA	Liquid (Solventborne & Waterborne)	Primer & Topcoat	Inorganic Polymer, Aluminum-Rich Epoxy-Polymer, Alkyd	Metal or Steel

Electropolyseal®
Electrocoat

Features	Potential Customer Benefits	Oil & Gas*	Construction
Application uniformity and consistency	Will not fill recesses or threads and lowers cost and increases throughput	✓	✓
Wide color palette	Provides differentiation through color	✓	✓
Accelerated cyclic corrosion protection	Protects assets and increases product longevity	✓	✓
Chip and impact protection (SAE J2334)	Protects surfaces with high blast profiles	✓	✓
Specially formulated without chrome or lead	Meets specific customer requirements	✓	✓
Precise torque control (ISO 10647)	Low coefficients of friction reduce and improve the uniformity of make-up torque	✓	✓

PPG Segments
Construction
Oil & Gas

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*Electropolyseal III not applicable to oil & gas

Availability	Technology	Coating Type	Chemistry	Substrates
USCA	E-coat	Zinc phosphate, zinc-rich base coat, zinc or zinc-rich nickel plating	Epoxy, Acrylic	Metal or Steel

ULTRAX®
Pretreatment

Chemistry	Features	Potential Customer Benefits	Oil & Gas	Construction
Alkaline Cleaner	Low temperature (85-120°F)	Provides energy savings and protection of temperature-sensitive parts	✓	✓
	Soil loading capacity	Reduces dumping and bath recharging	✓	✓
	Process versatility	Handles wide variety of parts	✓	✓

CORROSOL®
Pretreatment

Chemistry	Features	Potential Customer Benefits	Oil & Gas	Construction
Acid Pickler/ Descaler	Blend of sulfuric and phosphoric acid	Blend of acids makes it operationally easier to use.	✓	✓
	Low temperature (Ambient-120°F)	Increases energy savings from reduced natural gas consumption	✓	✓
	Weld cleaning	Improves performance on weld areas.	✓	✓

PPG Segments
Construction
Oil & Gas

CHEMFOS®
Pretreatment

Chemistry	Features	Potential Customer Benefits	Oil & Gas	Construction
Zinc-Phosphate	Sludge reduction	Reduces tank dumps	✓	✓
	Chemical and corrosion resistance	Protects assets and increases product longevity	✓	✓
	System versatility + expanded process	Handles variety of substrate requirements + provides multi-metal capabilities	✓	✓

ZIRCOBOND®
Pretreatment

Chemistry	Features	Potential Customer Benefits	Oil & Gas	Construction
Thin Film - Zirconium	Process versatility	Widens substrate options		✓
	Low temperature (60-115°F)	Increases energy savings with less natural gas consumption		✓
	E-coat compatibility	Increases performance with e-coat technologies		✓
	Chemical and corrosion performance	Protects assets and increases product longevity		✓

PPG Segments
Construction
Oil & Gas

Fastener Product Matrix

Technology	Product	Chemistry	Product Code	Color
Powder	ENVIROCRON®	Semi-Conductive Zinc Ultra Epoxy Primer	PCMT70101	Dark Gray
		Ultradurable Polyester Topcoat	PCTT99115	Black
Liquid	SPECTRACRON®	Zinc-Rich Inorganic Polymer Primers	SPR67868A	Dark Gray
			SPR67868B	Silver
		Aluminum-Rich Epoxy-Polymer Topcoats	SEP70958A	Silver
			SEP70958B	Silver
			SEP70958C	Silver
	Spincoat	Alkyd Topcoat	PT10005 to PT10025	Full Color Pallette
	Xylan	PAI/PTFE – Single Coat	1010	Multiple
			1014	Medium Blue, Black, Green, Yellow
			1070	Black, Dark Blue, Green, Gray, Light Blue, Yellow, Brown
		Epoxy – Single Coat	1270	Multiple
			1424	Dark Blue, Yellow, Orange, Red, Green, Blue, Black
			1427	Multiple
		Silicone Polyester – Single Coat	1514	Multiple
		Epoxy – Multiple Coats	5230	Black, Dark Blue, Silver-Gray
		Silicone Polyester – Multiple Coats	5164	Multiple
		Epoxy-Phenolic – Multiple Coats	5250	Multiple

Fastener Product Matrix

Technology	Product	Chemistry	Product Code	Color
Pretreatment and Engineered Products	ULTRAX™ 94D	Alkaline Cleaner	UT94D	N/A
	CORROSOL™	Acid Pickler / Descaler	COR851S	N/A
			COR890S	N/A
	CHEMFOS®	Zinc-Phosphate Pretreatment	CF700/710V VERSABOND™	N/A
			CF810	N/A
	ZetaPhos LS	Heavy Zinc-Phosphate Pretreatment	PT36214	N/A
	IRCO BOND® Z24		PT75200	N/A
	ZIRCOBOND® 4200	Thin-Film Zirconium Pretreatment	ZB4200	N/A
	RUSTAREST™ 53253	Rust-Preventative Soluble Oil	RA53	N/A
Electrocoat Systems	ELECTROPOLYSEAL® III	Zinc-Phosphate Pretreatment + POWERCRON® XP Epoxy Electrocoat	*Powercron* XP	Black, Brown, Green, Gray, Tan, Dark Green, Silver, Gold, Blue, Gold Metallic, Sandstone, Redwood
	Electropolyseal IV	Zinc-Phosphate Pretreatment + Zinc-Rich Basecoat + *Powercron* XP Epoxy or *Powercron* AL Acrylic Electrocoat	*Powercron* XP *Powercron* AL	
	Electropolyseal V	Zinc or Zinc-Nickel Plating + *Powercron* XP Epoxy or *Powercron* AL Acrylic Electrocoat	*Powercron* XP *Powercron* AL	