

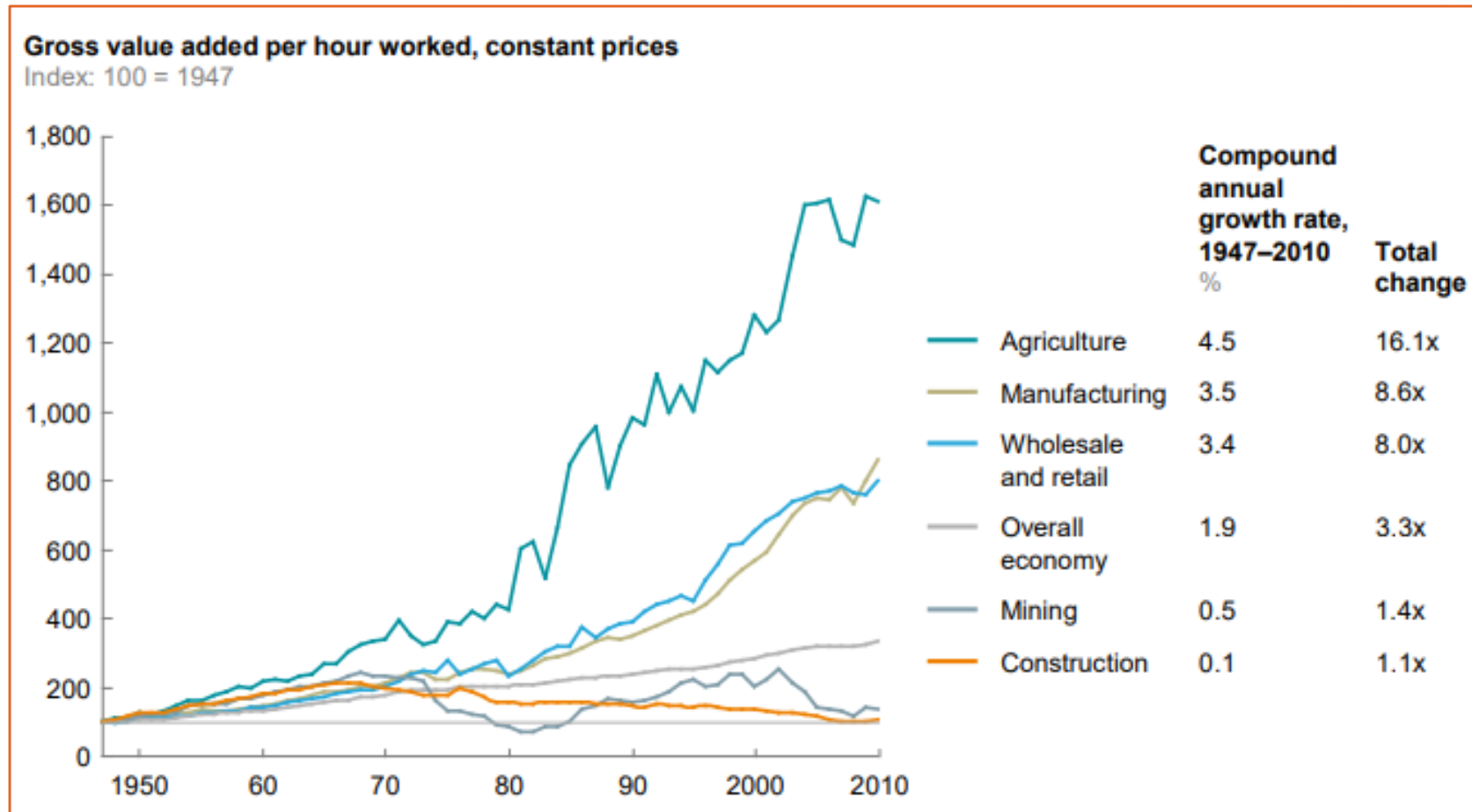


Etex New Ways

Bouw Industrialisatie

December 18, 2019

We all know it: Productivity in the construction sector has remained constant for the past 60 years



The opportunity

Modular construction
could claim

\$130B

of the market by 2030 in
U.S./Europe at moderate
penetration, delivering
annual cost savings of

\$22B

This would help fill a

\$1.6T

productivity gap identified
in 2017

Industrialised construction



The benefits

Modular construction can
speed construction by as
much as

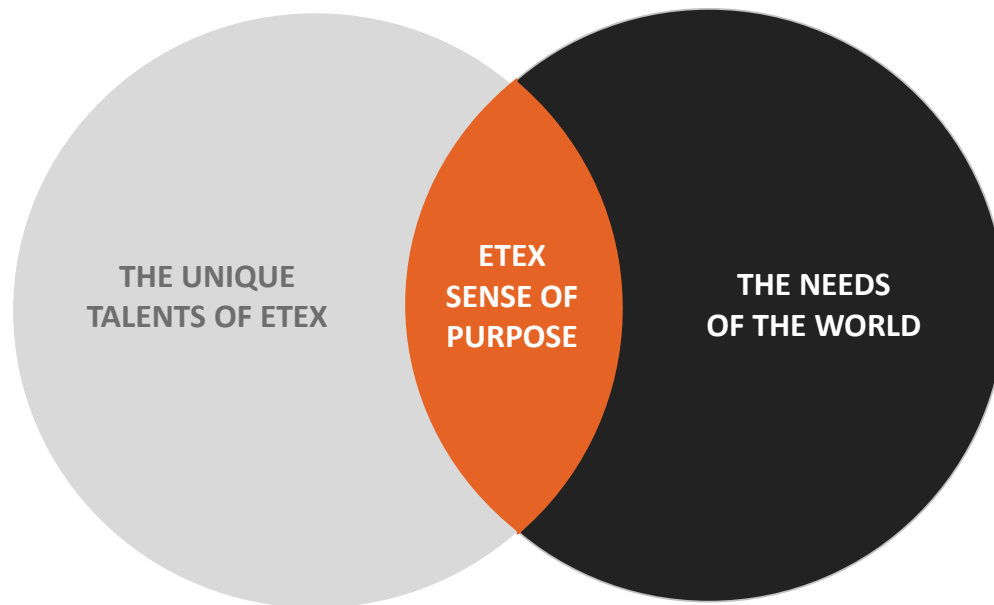
50%

In the right environment
and trade-offs, it can cut
costs by

20%

Etex contribution to the world is “Inspiring ways of living”

From core to care business



Build living spaces that are ever more
safe, sustainable, smart and beautiful

**With a collaborative and caring culture,
a pioneering spirit and a passion
To always do better for our customers**

Improve our **customers' quality of living**
with ever more effective lightweight solutions

Etex's key beliefs in industrialised construction



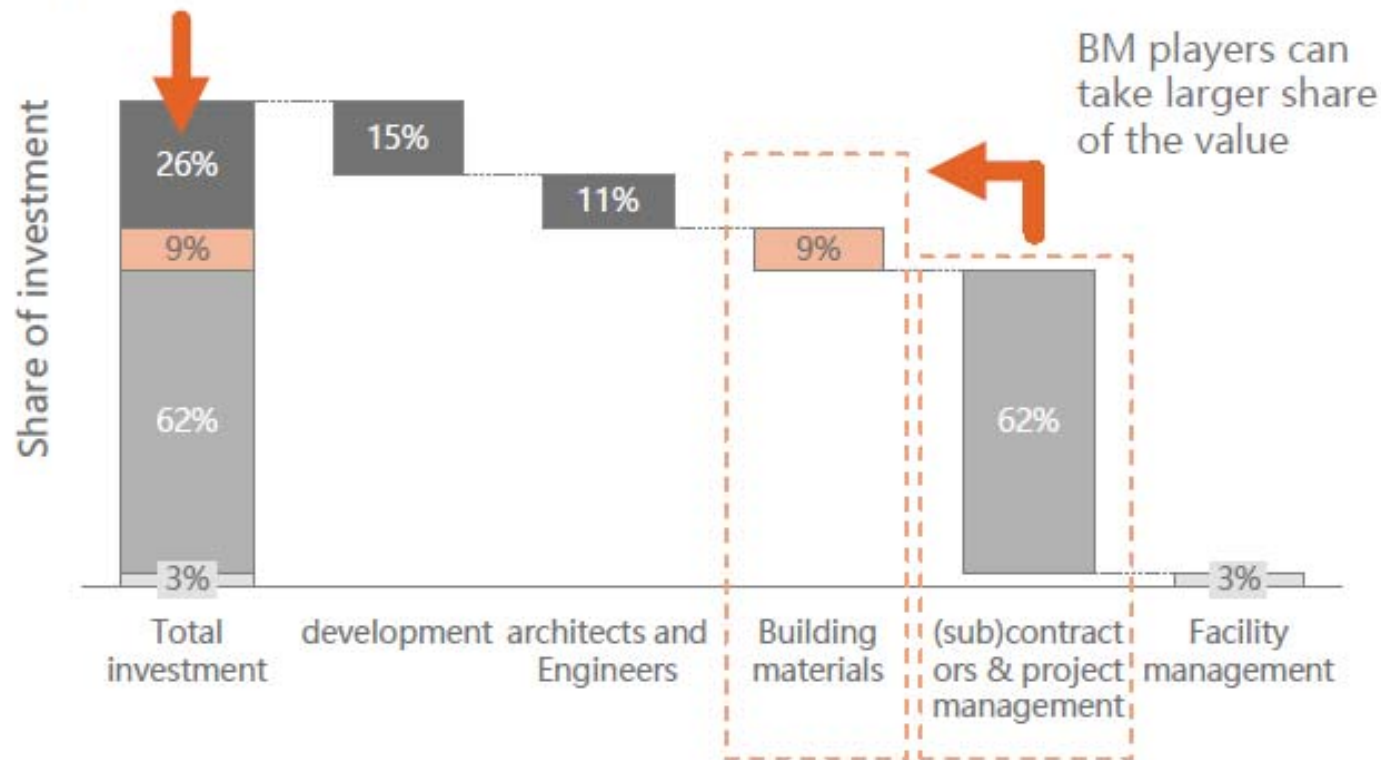
- 1 Building material companies can capture additional value from the construction value chain
- 2 Etex is uniquely positioned to capture this value
- 3 Industrialised construction is sustainable
- 4 Digital will be a key enabler of industrialization
- 5 ... And we have already started this journey

1

Building material companies can take a larger share of the construction industry value chain



Cost pressure increasing



2

Five reasons why we are uniquely positioned to create profitable growth in industrialised construction



Downstream integration and strong synergies with Etex plasterboard and fiber cement (back office, technical support, project sales...)



We know how to build and operate large plants in a very efficient way



We have the resources and market understanding needed to scale-up this business in our regions



We are uniquely positioned to develop a 'Digital Hub' (including competencies in fire protection, acoustics, engineered wood, structural engineering, etc...)



We have built partnerships with equal ambitions with local market leaders

3

Modular construction reduces energy and water consumption while diminishing waste and CO2 emissions



85% LESS
ENERGY CONSUMED



90% LESS
WATER CONSUMED



80% LESS
CO₂ EMISSIONS



85% LESS
CONSTRUCTION WASTE

4

Digital technologies will be a key enabler of industrialisation in the construction industry



**BIM &
digital asset mapping**



**Big data, predictive analytics
& Artificial Intelligence**



**Wireless monitoring
(sensors, RFID, IoT) &
connected equipment**



**Autonomous construction,
incl. drones & robotics**



**Pre-fabrication &
modular construction**



**3D printing/
additive manufacturing**



**Advanced Building
Materials**



**Cloud and real-time
collaboration,
mobile connectivity**



**3D scanning &
photogrammetry**



**Augmented reality &
virtualization**

5 ... And we have already started...

Tecverde



- Brazil
- Wood frame
- Capacity for 6000 units / year

EOS



- UK
- Steel frame
- Façades, Load bearing walls

E2E



- Chile
- Wood frame
- Capacity 2000 units / year

Growth through partnerships or greenfield... so lets talk...