

# A leading global company of surface treatment technologies

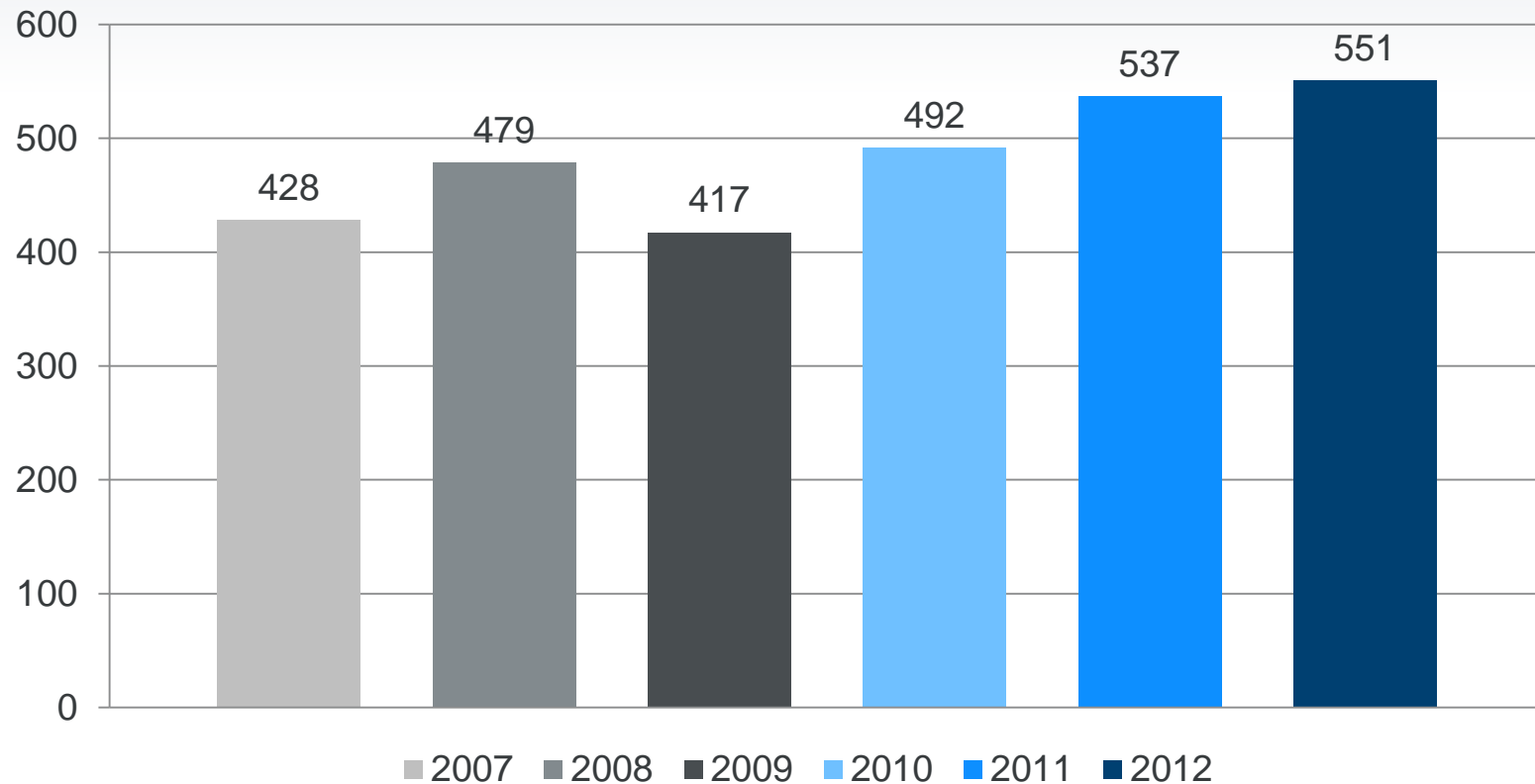
Presenters Name



**Chemetall**  
expect more<sup>+</sup>

# The Chemetall Group: Net External Sales

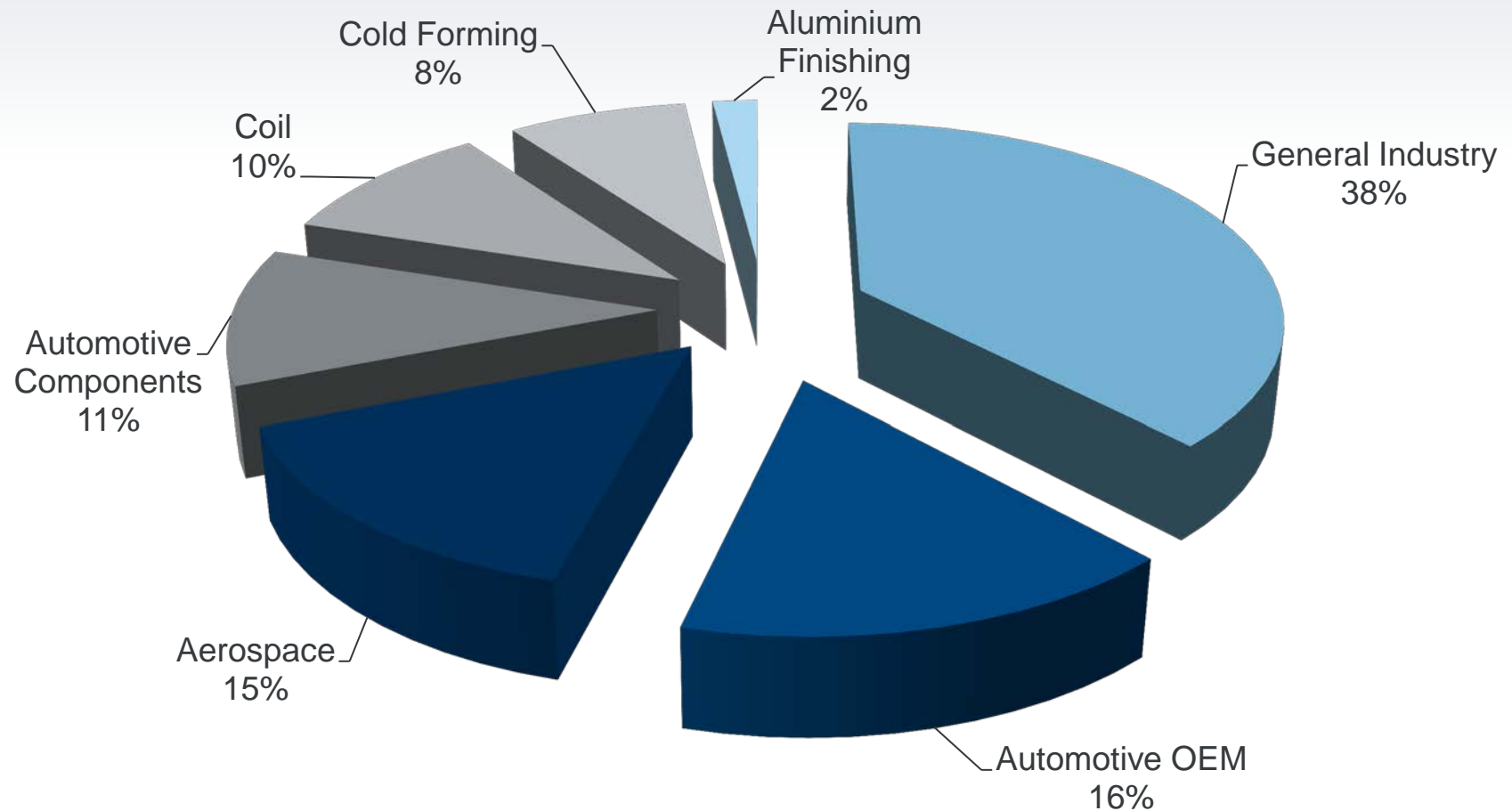
[EUR Mio\*]



Successful growth due to continuous investments and process optimization

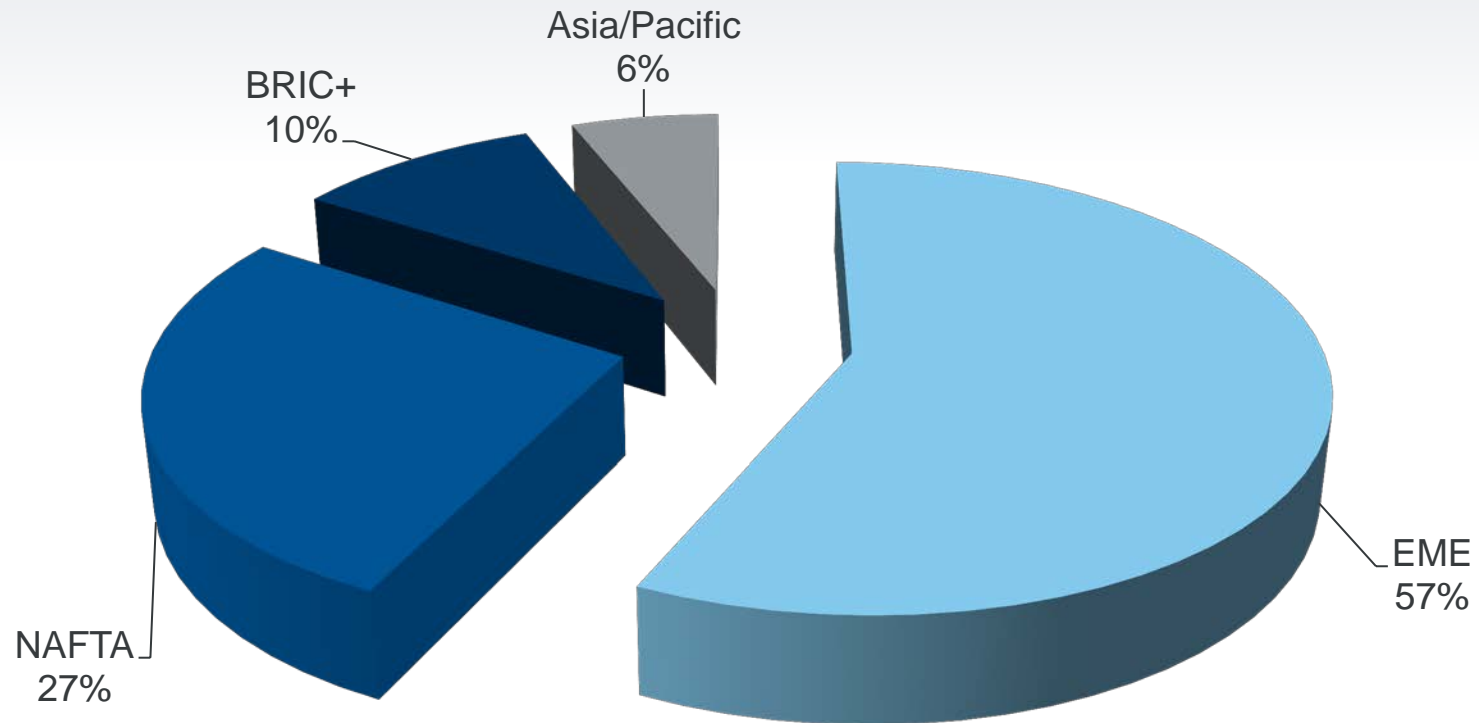
# The Chemetall Group:

## Net Sales by End-Use Market (2012)



Diversified portfolio for a variety of markets

# The Chemetall Group: Net Sales by Geography (2012)



Chemetall - Worldwide a leading surface treatment supplier

# History

1881	Foundation of Metallgesellschaft in Frankfurt/M., Germany
1923	Start of Lithium operations
1931	License Agreement with Parker Rustproof, USA
1982	“Abteilung technische Verfahren” founded as Chemetall, Germany
1987	Termination of License Agreement with Parker, USA
1992	Acquisition of Dynamit Nobel, integration of Chemetall
1990	Acquisition of Oakite, USA
1996	Cross License Agreement with Nippon Paint, Japan
1998	Acquisition Foote Corporation, USA
2000	Acquisition of Brent International, UK
2001	Acquisition of Aerospace Business of Dinol, Sweden
2004	Dynamit Nobel sold, Chemetall integration into Rockwood Holdings, USA
2007	Acquisition of chemical business of Wirral Fospray, UK
2008	Acquisition of GE Betz (GE Metals), USA
2008	Acquisition of NDT products of Ely Chemical Company, UK
2008	Acquisition of Nalco Finishing Technologies in USA and Asia
2010	Acquisition of Surface Treatment Business of Tergo Ind. Ltd., New Zealand
2010	Acquisition of Artech Technologies Pty Ltd, Australia
2012	Separation of Lithium business into the newly founded Rockwood Lithium

Driving growth through innovations, acquisitions and partnerships

# Technologies:

## High-Performance Product Groups

- + Cleaners and etchants
- + Corrosion protection
- + Conversion coatings
- + Thin organic coatings and primers
- + Lubricants for metal forming
- + Anodizing
- + Chemicals for waste water treatment
- + Paint strippers and paint detackification
- + Non-destructive testing materials and equipment
- + Aircraft sealants



Variety of state-of-the-art and eco-friendly technologies

# IDEA!

## The Concept for Success

Productivity  
accelerator for  
customers by  
offering integrated  
system solutions



Global supplier  
of choice



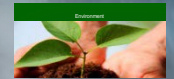
Most efficient use  
of our expertise  
& assets leading  
to profitable and  
sustainable growth



Environmentally-sound  
and game-changing  
technologies

IDEA! Concept - Driver of our customers' and Chemetall's business success

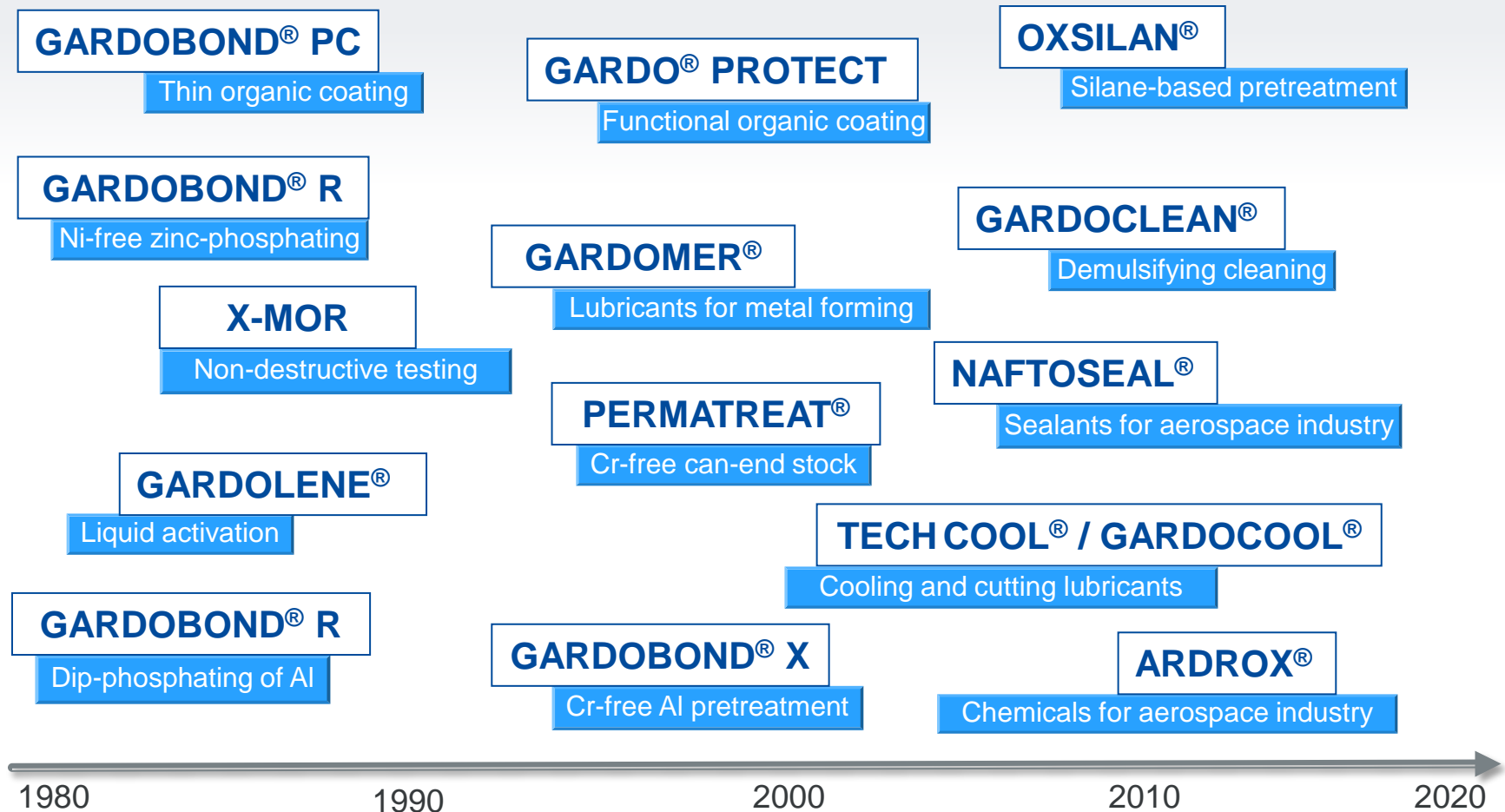




**Productivity accelerator  
for customers by offering  
integrated system solutions**

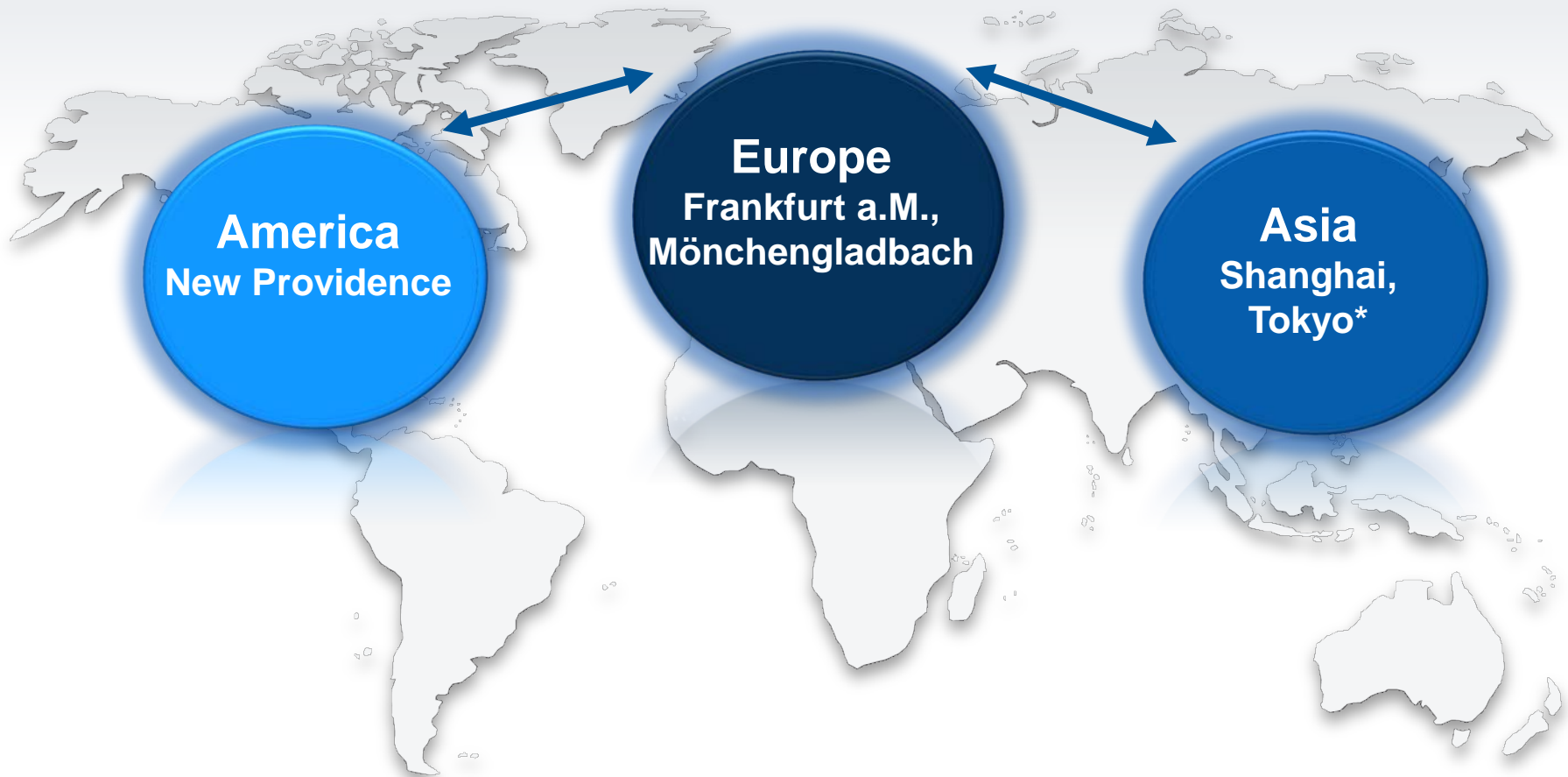


# Technologies: Innovated by Chemetall (Extract)



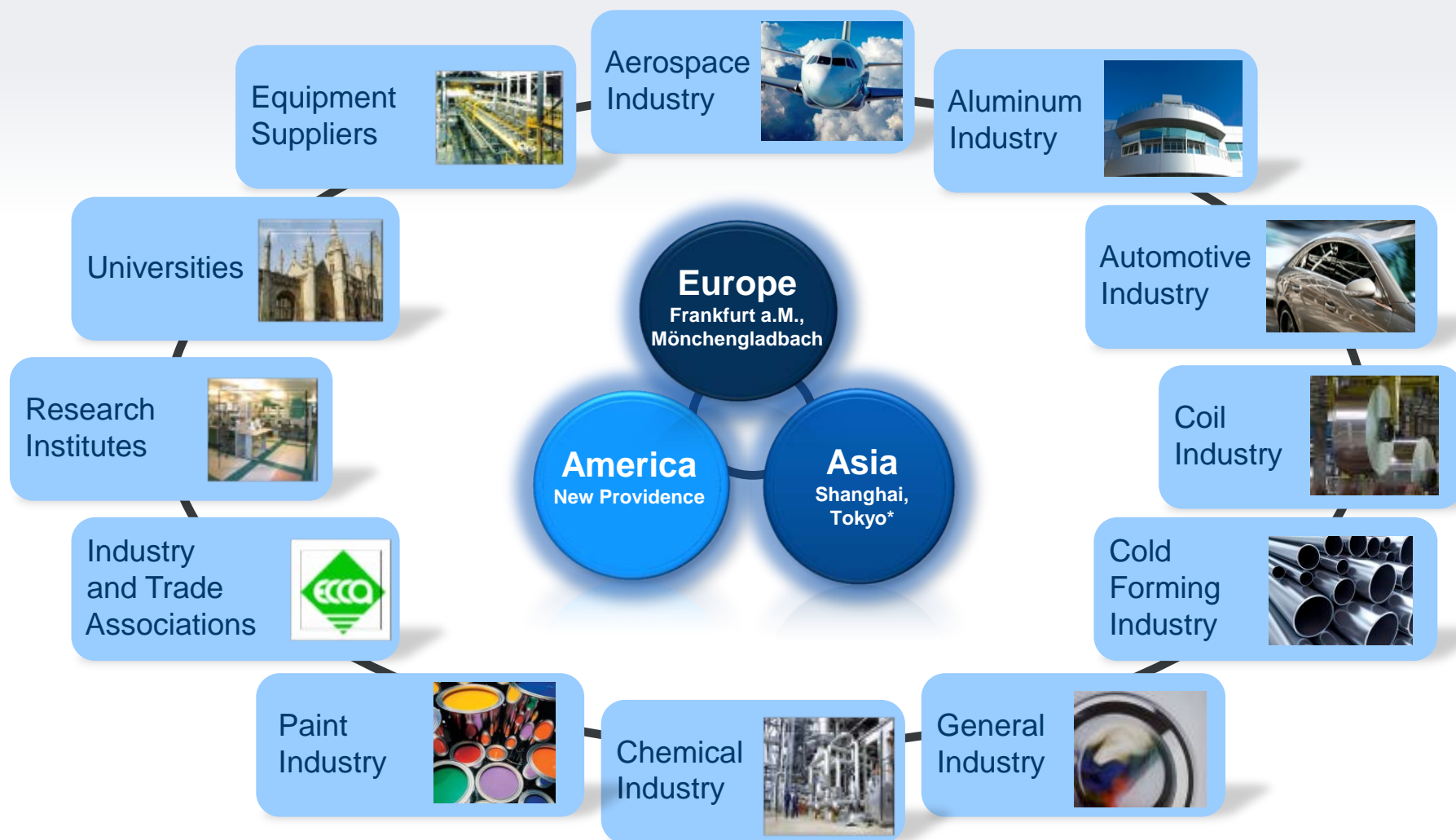
Chemetall plays a leading role in surface treatment

# Global R&D Centers



One global R&D organization with regional centers of excellence

# Global R&D Network



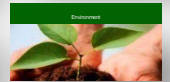
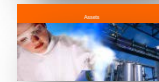
Strong R&D network to meet future market needs

# Dedication

**Chemetall**  
expect more<sup>+</sup>

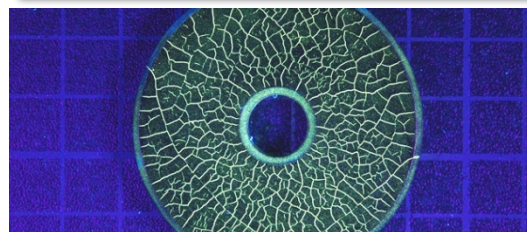
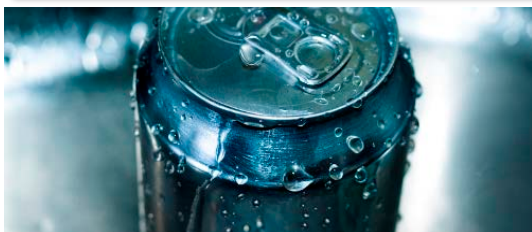


**Global supplier  
of choice**





# Markets We Serve



Extensive expertise network gained through operating in various markets

# Markets (I)



## Aerospace

Sealants and sealant removers, NDT products and equipment, corrosion protection, cleaners, pretreatment and paint strippers for airframe, aircraft operation and aero-engine applications.



## Aluminium Finishing

Pretreatment technologies, anodizing processes and service products ensure an excellent surface in the architectural and construction industry.



## Appliances, HVAC

Broad portfolio eco-friendly, nickel-free and chrome-free processes – from cleaners, conversion coatings, paint detackification to maintenance chemicals.



## Automotive OEM

Globally harmonized technologies available for NDT products, inhibitors, conversion coatings, cleaners, coolants, activating and passivating agents and maintenance chemicals.



# Markets (II)



## Automotive Components

Broad portfolio of technologies from cleaners to conversion coatings for all kinds of components and substrates, such as steel or aluminium wheels, bumpers or diesel injection systems.



## Coil

A variety of technologies for coil coating and galvanizing processes. Prepainted and passivated metal sheets are used in automotive, building, electrical and packaging industries.



## General Industry

Broad portfolio of metal pretreatment technologies for all kinds of applications such as furniture, garden fences, trains, electrical cabins and many more.



## Heavy Equipment

Eco-friendly and efficient technologies ensure an excellent and long-term surface quality for off-road vehicles, construction equipment, industrial machines and agricultural vehicles .

## Markets (III)



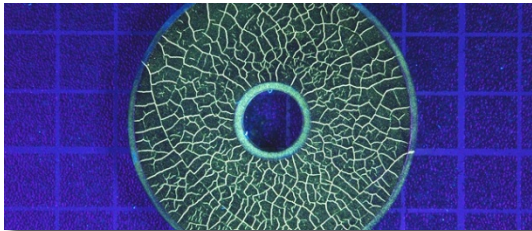
### **Metal Forming**

Tube industry (from the blank tube to the precision tube), wire industry (from cold heading to spring steel wire) and cold extrusion (complex geometries extruded net shape).



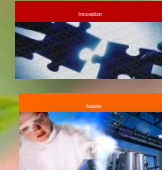
### **Metal Packaging**

High efficient cleaners, conversion treatments and mobility enhancers for the aluminium beverage can manufacturing.



### **Non-Destructive Testing (NDT)**

More than 60 years of experience in Penetrant (PT) and Magnetic Particle Testing (MT): aircraft engine manufacturing & overhaul, automotive, energy and general industry.



**Environmentally-sound and  
game-changing technologies**

# Committed to our Responsibility

## Environment

- ⊕ Chemetall supplies all the necessary technologies, processes and training while continuously searching for ways and methods to improve the environmental performance.
- ⊕ Chemetall's performance is consistently above respective official local requirements.

## Health and Safety

- ⊕ Regular trainings and investments in safety equipment ensure a safe working environment.
- ⊕ Chemetall continues on this path towards the goal of zero accidents.

Chemetall is committed to highest standards of environment, health and safety



# Certifications

Chemetall is certified  
amongst others according to:

- + DIN EN ISO 9001 (Overall)
- + ISO/TS 16949 (Automotive)
- + EN ISO 9100 (Aerospace)
- + ISO 14001 (Environment)



Qualified for our customers' success

# Chemetall and REACH

## ⊕ Team

A dedicated team of five employees is in charge of REACH and international registrations on behalf of Chemetall GmbH and its EC affiliates, as well as for two other Rockwood companies.

## ⊕ Activities until today

- > 350 substances have been pre-registered
- 44 substances have been registered according to REACH (handed in 72 registration dossiers)
- another 17 substances will be registered by May 31th, 2013 latest (handed in 31 registration dossiers)
- approx. 2,000 Material Safety Data Sheets (MSDS) have been updated, others are subject to ongoing revision.

Our customers can rely on a trustful, strong and innovative partner



# Assets

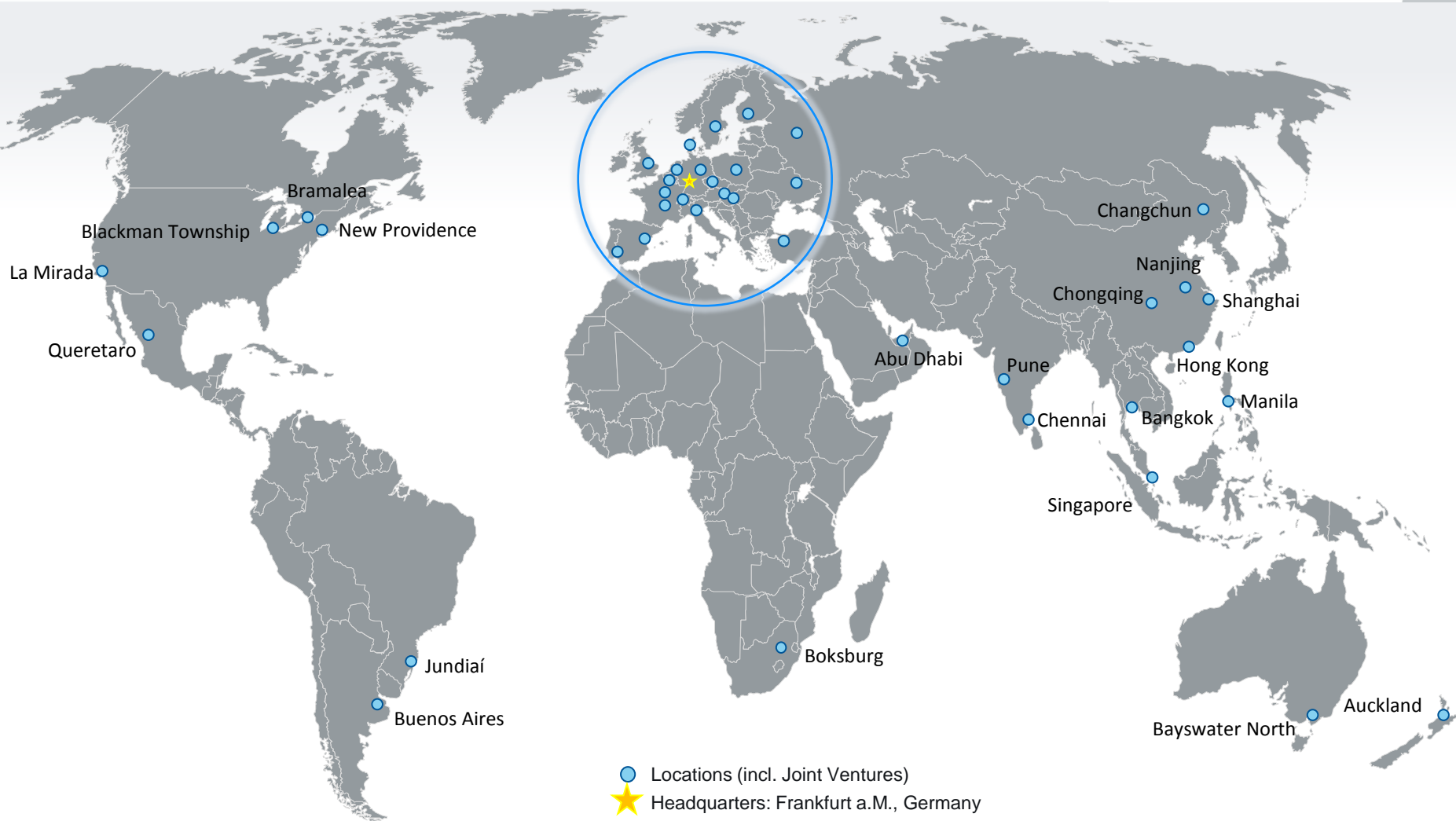
**Chemetall**  
expect more<sup>+</sup>



**Most efficient use of our expertise and  
assets leading to  
profitable and sustainable growth**

# Strong Global Presence: At a Glance

**Chemetall**  
*expect more<sup>+</sup>*



Chemetall enables customers' growth in all regions of the world

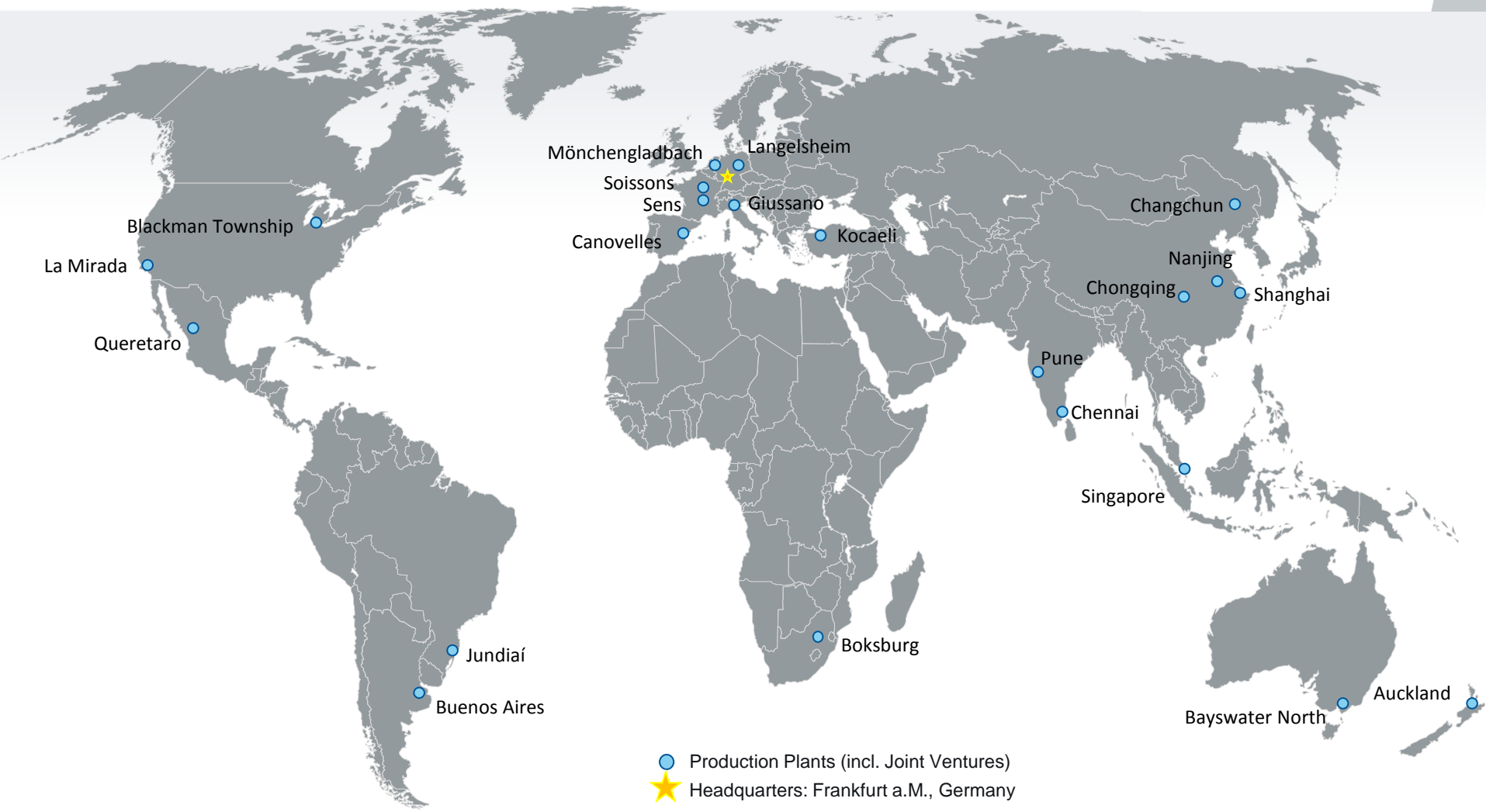
# Strong Global Presence: Europe

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Chemetall enables customers' growth in all regions of the world

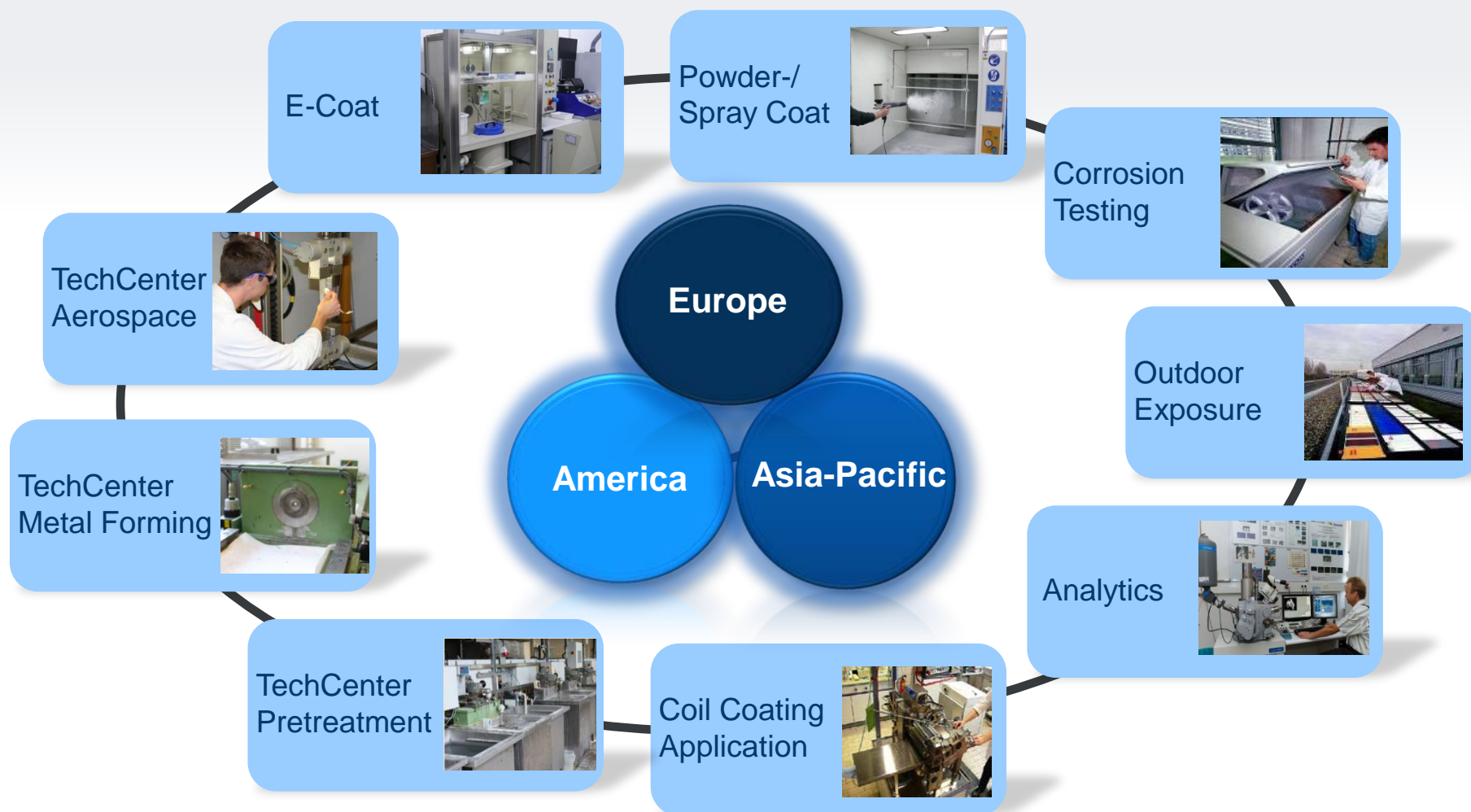
# Strong Global Presence: Production Plants



Production plants on all continents ensure fast delivery



# Comprehensive Technical Services



Expertise and a broad range of technical services for our customers' success

# Successful Trademarks - Worldwide

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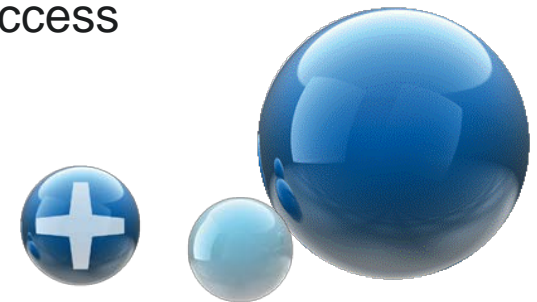
**ARDROX<sup>®</sup>** **GARDOCLEAN<sup>®</sup>** **GARDOMER<sup>®</sup>**  
**GARDOFLOC<sup>®</sup>** **GARDACID<sup>®</sup>** **GARDOLENE<sup>®</sup>**  
**GARDO<sup>®</sup>** **GARDOLUBE<sup>®</sup>** **NAFTOSEAL<sup>®</sup>**  
**CHECKMOR<sup>®</sup>** **OXSIAN<sup>®</sup>** **SUPRAMOR<sup>®</sup>**  
**GARDOCOOL<sup>®</sup>** **GARDO<sup>®</sup> PROTECT** **BRITEMOR<sup>®</sup>**  
**TECH COOL<sup>®</sup>** **GARDOBOND<sup>®</sup>** **PERMATREAT<sup>®</sup>**  
**LUMOR<sup>®</sup>** **GARDOSTRIP<sup>®</sup>** **GARDOROL<sup>®</sup>**  
**ANTOX<sup>®</sup>** **OAKITE<sup>®</sup>**

Our global brands have proven to be successful in millions of applications



# Summary

- ⊕ Chemetall - A leading global surface treatment company
- ⊕ Enables customers' growth in all regions due to
  - global organization
  - broad market expertise
  - comprehensive technical services
- ⊕ Strong focus on the development of environmentally-sound and game-changing technologies
- ⊕ Committed to highest standards of safety, health and environment
- ⊕ Long-term relationship with key customers to joint success

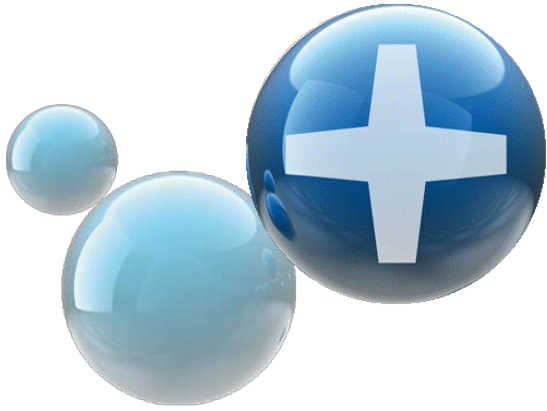


Chemetall - The only globally dedicated surface treatment company

# Thank you very much for your attention!

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# *Chemetall*

*expect more* 

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