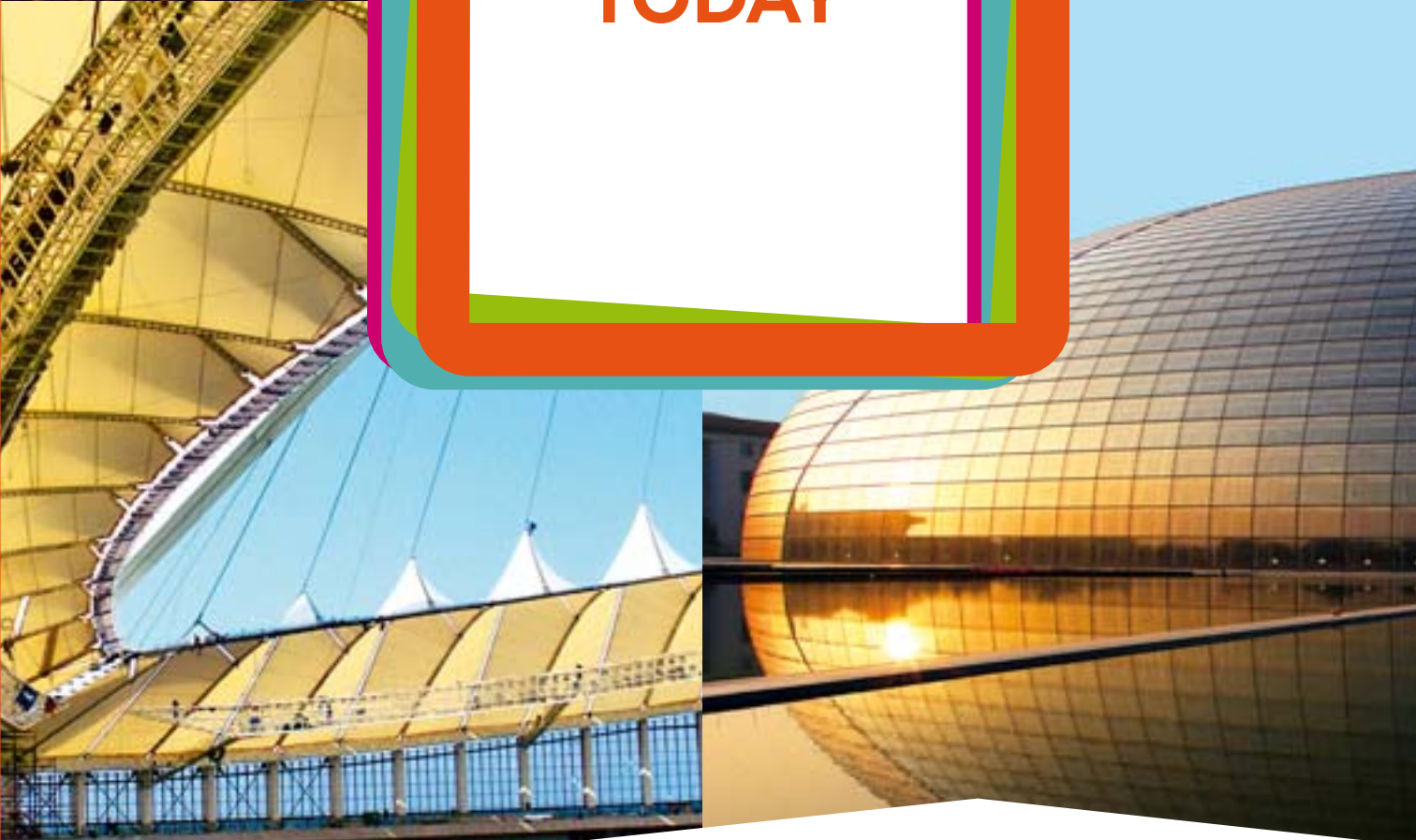




**SAINT-GOBAIN**  
**TODAY**



**SWEDEN**  
2012

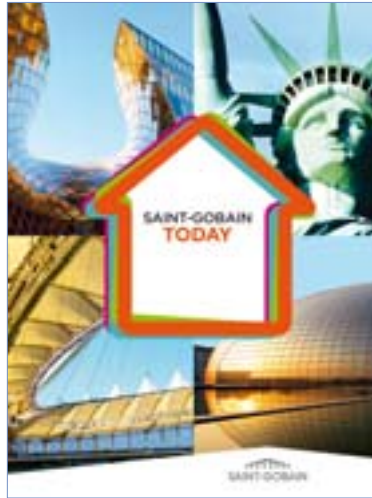
**Emporia shopping center**

Glassolutions, Vetrotech Saint-Gobain, Saint-Gobain Abrasives, Weber, ISOVER and Gyproc supplied materials for the construction of Emporia in Malmö, Sweden, one of the largest shopping centers in northern Europe.

**SOUTH AFRICA**  
2009

**Moses Mabhida Stadium**

Saint-Gobain delivered over 45,000 square meters of SHEERFILL® II architectural membrane to cover the Moses Mabhida Stadium in Durban.



**UNITED STATES**  
2013

**Statue of Liberty**

Vetrotech Saint-Gobain, the worldwide leader in fire-rated glass, provided glass for the oculus, doors, floors and stairs of the Statue of Liberty in New York.

**CHINA**  
2006

**National Center for the Performing Arts in Beijing**

ISOVER provided the floor and dome insulation for the National Center for the Performing Arts in Beijing. The center's 600 square-meter steel shell is covered with sheets of glass from Saint-Gobain Glass.

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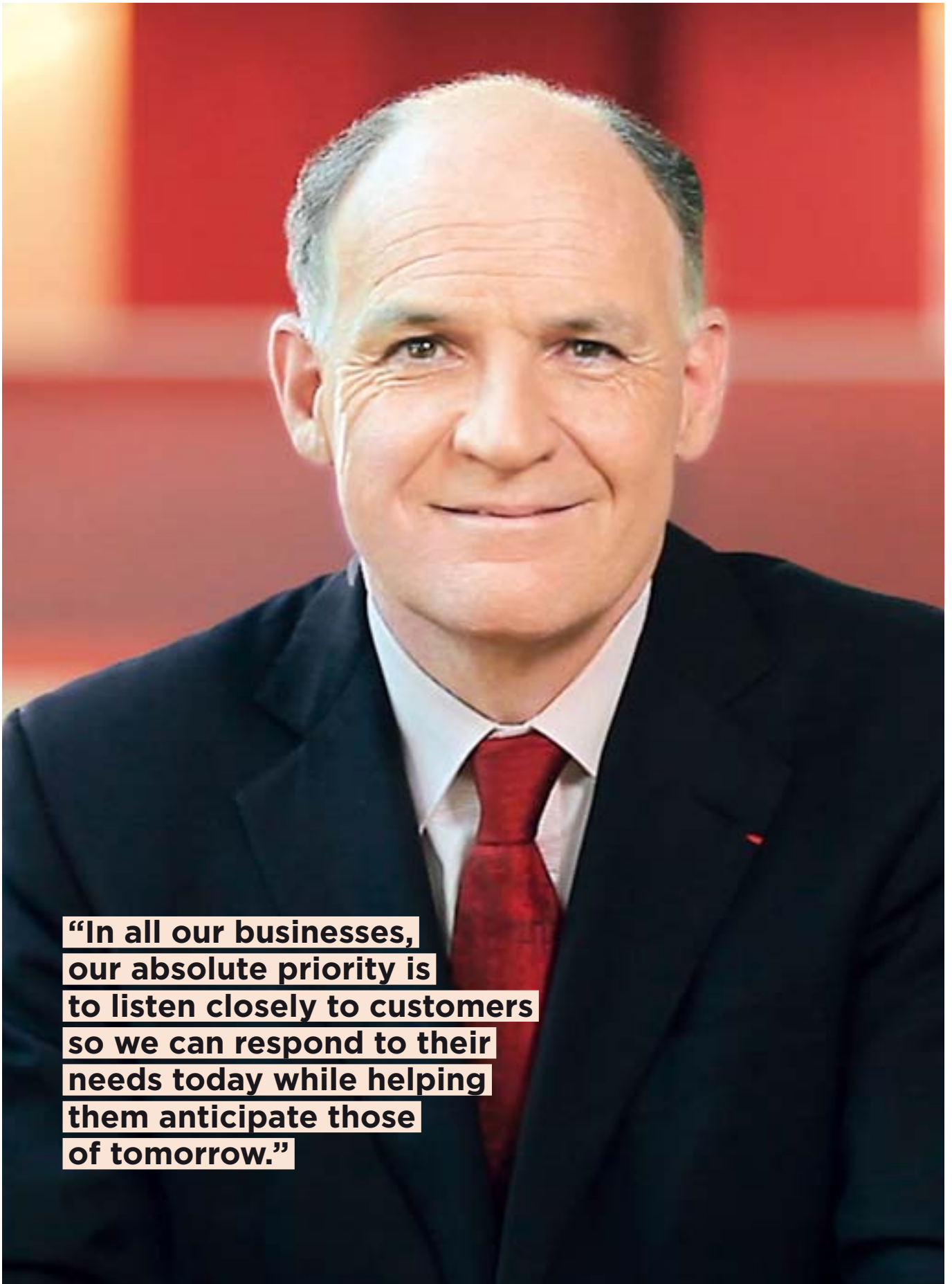
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# OUR AMBITION

## INVENT THE MATERIALS OF THE FUTURE

Saint-Gobain, the world leader in sustainable habitat and construction markets, designs, manufactures and distributes building and high-performance materials, providing innovative solutions to the challenges of growth, energy efficiency and environmental protection.



**“In all our businesses, our absolute priority is to listen closely to customers so we can respond to their needs today while helping them anticipate those of tomorrow.”**

# FOUR QUESTIONS FOR PIERRE-ANDRÉ DE CHALENDAR

## How would you describe 2013?

For Saint-Gobain, 2013 was a positive year thanks to the upturn in business in the second half. After an uneven start in the first six months, the international environment recovered well in the United States and Europe, as the euro zone pulled out of recession at the end of the year. Overall, the situation was slightly less favorable than expected in the fast-growing economies, but this did not keep our solutions from increasing their penetration in most of these markets.

Aside from swings in the economy, I would say that, above all, 2013 was a year of great progress in implementing our strategy. I am thinking in particular of the large number of innovations introduced during the year that help make Saint-Gobain one of the most innovative companies in the world; of our accelerated expansion in fast-growing countries; or of the continued reduction in our cost base, which set the stage for a significant rebound in our financial results in the second half. And, of course, we took a major step forward in focusing Saint-Gobain on its core markets of habitat and construction and high-performance materials by selling Verallia North America under excellent conditions. These advances demonstrate once again the outstanding commitment of all our teams, which I deeply appreciate. Thanks to their work, Saint-Gobain gains greater recognition each day as a company of reference in all of its markets.

## What are the implications of your ambition to be the reference in your businesses?

Being the reference implies a strategy of overall excellence that is particularly demanding because it goes beyond simply striving for leadership in terms of sales volumes or geographic expansion. Our goal is to be systematically in the best position to serve our customers as effectively as possible on a daily basis, and over the long term. We want to be an active player in sustainable habitat solutions and provide technologies that change daily life, while ensuring the responsible development of our activities in a way that respects both the environment and individual health and safety, and by forging solid partnerships with our surrounding communities. We are committed to preserving this balance, day after day.

## What are your growth paths for 2014?

We will resolutely pursue the implementation of our strategy. With the upturn in worldwide business, we will be able to accelerate our investments and acquisitions in fast-growing countries and high-performance materials and further strengthen our distribution networks in their most advanced markets. We will also enhance the Group's organic growth potential through the development of new services, thanks to digital technologies in particular. More generally, we will

continue to increase the proportion of solutions that offer high value added or that are co-developed with our customers.

## Speaking of customers, what are you doing for them specifically?

In all our businesses, our absolute priority is to listen closely to customers so we can respond to their needs today while helping them anticipate those of tomorrow. On a daily basis, aside from offering the solutions of reference in our various markets, we are constantly adapting our products and services to make it easier for our customers to focus on their core businesses, for example by reducing their administrative constraints, by offering training courses that best meet their needs, by aligning our research capabilities with their development projects or by strengthening our logistics services or mobile applications. To help customers anticipate their future needs, we are working as closely as we can with them on the solutions of tomorrow, whether this means introducing highly innovative products, planning for changing regulations in their markets or developing new services, for example in the area of digital technologies.



**Pierre-André de Chalendar**  
Chairman and Chief  
Executive Officer

# SAINT-GOBAIN RANKS AMONG THE WORLD'S TOP 100 INDUSTRIAL GROUPS\*

## 350 years OF HISTORY



UNITED STATES



MEXICO



CHINA



AUSTRIA

NET SALES OF

€42 billion

NEARLY

190,000

EMPLOYEES

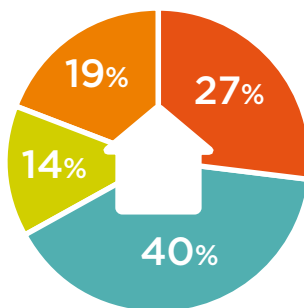
OPERATIONS IN

64 COUNTRIES

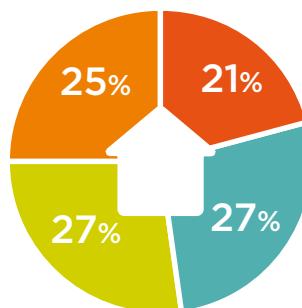


- |                |                      |
|----------------|----------------------|
| ALGERIA        | MOROCCO              |
| ARGENTINA      | MEXICO               |
| AUSTRALIA      | NORWAY               |
| AUSTRIA        | NEW ZEALAND          |
| BELGIUM        | NETHERLANDS          |
| BHUTAN         | PERU                 |
| BRAZIL         | POLAND               |
| BULGARIA       | PORTUGAL             |
| CANADA         | QATAR                |
| CHILE          | REPUBLIC OF IRELAND  |
| CHINA          | ROMANIA              |
| COLOMBIA       | RUSSIA               |
| CZECH REPUBLIC | SAUDI ARABIA         |
| DENMARK        | SERBIA               |
| EGYPT          | SINGAPORE            |
| ESTONIA        | SLOVAKIA             |
| FINLAND        | SLOVENIA             |
| FRANCE         | SOUTH AFRICA         |
| GERMANY        | SOUTH KOREA          |
| GREECE         | SPAIN                |
| HUNGARY        | SWEDEN               |
| INDIA          | SWITZERLAND          |
| INDONESIA      | SYRIA                |
| ITALY          | THAILAND             |
| JAPAN          | TURKEY               |
| JORDAN         | UKRAINE              |
| KUWAIT         | UNITED ARAB EMIRATES |
| LATVIA         | UNITED KINGDOM       |
| LEBANON        | UNITED STATES        |
| LITHUANIA      | VENEZUELA            |
| LUXEMBOURG     | VIETNAM              |
| MALAYSIA       | ZIMBABWE             |

BY GEOGRAPHIC AREA



NET SALES



OPERATING INCOME

- FRANCE
- OTHER WESTERN EUROPEAN COUNTRIES
- NORTH AMERICA
- FAST-GROWING COUNTRIES AND ASIA

# OUR **BUSINESSES**

SAINT-GOBAIN IS ORGANIZED  
INTO FOUR SECTORS.



**21%**  
of consolidated net sales

## **INNOVATIVE MATERIALS**

Comprising the Flat Glass and High-Performance Materials Activities, the Innovative Materials Sector offers a unique portfolio of materials and processes for the habitat and industrial markets.

**FLAT GLASS**  
**No. 1 in Europe**  
**No. 2 worldwide**

- Present in **42** countries
- More than **32,000** employees

**HIGH-PERFORMANCE MATERIALS**  
**No. 1 worldwide**

- Present in **42** countries
- More than **26,000** employees



**25%**  
of consolidated net sales

## **CONSTRUCTION PRODUCTS**

The Construction Products Sector offers interior and exterior solutions to enhance the comfort of buildings and homes, including plaster, acoustic and thermal insulation, wall facing, roofing and pipe systems.

**No. 1 worldwide**  
> Ductile cast iron pipe  
> Plasterboard and plaster products  
> Insulation  
> Tile adhesives

**No. 1 in Europe**  
> Wall facings

**No. 2 in the United States**  
> Siding

- Present in **55** countries
- More than **47,000** employees





## BUILDING DISTRIBUTION

The Building Distribution Sector brings to the Group a thorough understanding of customers' needs, whether they are building professionals, private project owners or large companies. It serves the new building, renovation and home improvement markets.

**No. 1 in Europe**  
> Building materials distribution

- Present in **27** countries
- More than **64,000** employees
- Nearly **4,400** sales outlets



## VERALLIA PACKAGING

Under the Verallia brand, the Packaging Sector is a major manufacturer of bottles for wines and spirits and jars for food products. Verallia also markets glass containers for beer, fruit juices, soft drinks, mineral water and oil.

**No. 2 worldwide**  
> Glass bottles and jars

- Present in **14** countries
- **14,000** employees





# INVENT **THE MATERIALS OF THE FUTURE**

Saint-Gobain has made the strategic decision to become the reference in sustainable habitat and construction markets. The Group takes a long-term view in order to develop products and services for its customers that facilitate sustainable construction. It invents innovative, high-performance solutions that improve our habitat and everyday life.

# THE REFERENCE IN SUSTAINABLE HABITAT AND CONSTRUCTION MARKETS

## Homes and buildings in industrialized countries\*

**40%**

OF ENERGY CONSUMPTION

**38%**

OF GREENHOUSE GAS EMISSIONS

**12%**

OF DRINKING WATER CONSUMPTION

**40%**

OF SOLID WASTE

### Acoustic and visual comfort

Ecophon has launched Soundlight Comfort Ceiling, an acoustic ceiling system with integrated LED lighting co-developed with Philips.



## Products and services that improve our habitat and everyday life


Investing in habitat solutions is one of the major challenges facing both the most mature and the fastest growing economies. Governments around the world are adopting policies designed to improve housing and working conditions and to reduce energy consumption in the building sector in the face of accelerating global warming and diminishing natural resources.

At the same time, faster technological innovation in the construction

industry is helping to drive significant advances in the architectural quality and environmental performance of buildings. As technology transfers take place with growing frequency between the manufacturing and construction sectors, construction solutions are increasingly based on high-performance materials. The development of building techniques and the significant expansion of the Internet have led to growing demand among contractors for ever more efficient and innovative distribution solutions.

These underlying trends create substantial opportunities for Saint-Gobain. Saint-Gobain is developing high value-added construction and renovation solutions for professional customers to ensure that buildings are energy efficient, comfortable, healthy and esthetically superior, while at the same time protecting natural resources. The Group offers easy-to-use solutions aligned with local needs and practices in every segment of the construction market.

\*Source: "Building Design and Construction: Forging Resource Efficiency and Sustainable Development", United Nations Environment Program-Sustainable Buildings and Climate Initiatives (UNEP-SBCI).

 **WORLDWIDE LEADERSHIP BASED ON COMPLEMENTARY STRATEGIC POSITIONS IN BUILDING MATERIALS AND HIGH-PERFORMANCE MATERIALS TECHNOLOGIES.**



## Complementary businesses

Saint-Gobain is organized around four Sectors – Innovative Materials, Construction Products, Building Distribution and Packaging.

To implement the Group strategy, Saint-Gobain is supported by three pillars, each having its own growth drivers contributing in a complementary manner to overall expansion.

The **Innovative Materials** Sector, comprising the Flat Glass and High-Performance Materials Activities, is Saint-Gobain’s technological bridgehead. With its unique portfolio of materials and processes for the habitat and industrial markets, the Sector embodies the Group’s innovation-oriented culture and accounts alone for almost two-thirds of the Group’s total research and development commitment. The aim

is to increase the Sector’s focus on high value-added and co-developed solutions.

The **Construction Products** Sector offers interior and exterior products for the buildings of today and tomorrow, including plaster and plasterboard products, acoustic and thermal insulation products, wall facings, roofing products and pipe systems. Its diversified business base provides an unmatched referral network, a worldwide industrial presence and a portfolio of high-profile brands like ISOVER, PAM, Weber, Placo®, Gyproc and CertainTeed. It gives the Group a global footprint, with an extensive presence in fast-growing markets.

The **Building Distribution** Sector drives the sustainable habitat strategy by bringing to the Group a

thorough understanding of the needs of building professionals, private project owners and large companies. Its strength lies in its detailed knowledge of the newbuilding, renovation and home improvement markets and how they are changing. The Sector plays a key role in helping craftsmen embrace and acquire new building renovation techniques. It is a low capital intensive business with a strong cash position.

**Verallia**, Saint-Gobain’s **Packaging** Sector and the world’s number two manufacturer of glass containers, is a major supplier of bottles for wines and spirits and jars for food products. It also markets glass bottles for beer, fruit juices, soft drinks, mineral water and oil. As a Sector that is not directly involved in Saint-Gobain’s sustainable habitat strategy, Verallia is being gradually divested.

# THE REFERENCE IN SUSTAINABLE HABITAT AND CONSTRUCTION MARKETS

## Unique positioning

Saint-Gobain is uniquely positioned, with complementary strategic positions in building materials and high-performance materials technologies.

- It is a **worldwide or European leader** in all of its businesses, with local solutions tailored to the needs of each market.
- It has an **unrivalled portfolio** of energy efficiency **products and solutions**.
- With its **deep understanding of building professionals' needs**, acquired through daily contacts with customers, solutions can be adapted to highly specific customer requirements.

- It has an **outstanding potential for innovation**, supported by a unique industrial and distribution expertise and a commitment to materials research.
- Its **culture of operational excellence** gives the Group an underlying robustness and the ability to respond quickly to changes in the economic environment.
- Its **solid set of tested values** helps the Group to build lasting relations with all stakeholders, from customers and employees to suppliers, subcontractors, shareholders and the community.

## Strategic refocusing on the most promising habitat and industrial markets

As part of its strategic refocusing, Saint-Gobain sold Verallia North America to Ardagh for an enterprise value of \$1,694 million. The Group also sold its PVC Pipe and Foundations business in the United States to North American Pipe Corporation, a subsidiary of Westlake Chemical Corporation (NYSE:WLK), based in Houston, Texas, and signed an agreement for the sale of its US-based Fiber Cement siding business to Plycem USA, a subsidiary of Mexican group Elementia.



## LEADING-EDGE HIGH-PERFORMANCE MATERIALS

The High-Performance Materials Activity delivers high value-added solutions for very different, complex applications in construction, as well as in industry. The Activity's in-depth expertise in a range of technologies allows the Group to get the most out of the complementary nature of its three families of materials (ceramic materials, high-performance polymers and glass fiber yarn). As a result, Saint-Gobain can design solutions to meet its customers' specific needs, often in industrial niches that are well suited to co-development strategies.

## Saint-Gobain is inventing the world of tomorrow, offering solutions today to construct the buildings of the future



Buildings are the leading consumers of energy in the industrialized countries. Poor insulation is the main cause of energy wastage. With Saint-Gobain's innovative solutions, the energy used for heating can be cut by 80 percent.



The Multi-Comfort house combines all Saint-Gobain's innovative solutions for sustainable, healthy and attractive buildings that protect the environment of each of its inhabitants. However, Multi-Comfort is not just for single-family homes, it also applies to apartment blocks and service buildings.



Saint-Gobain distributes habitat solutions in nearly 4,400 sales outlets in 27 countries. Its local network - unique in Europe - offers hundreds of thousands of products, along with expertise and advice from professionals attuned to customer needs.



Saint-Gobain is present in more than 60 countries and is expanding rapidly in fast-growing markets. The Group provides tangible answers to urbanization in high-growth-rate countries, with solutions for single-family homes and apartment buildings, businesses and communities.



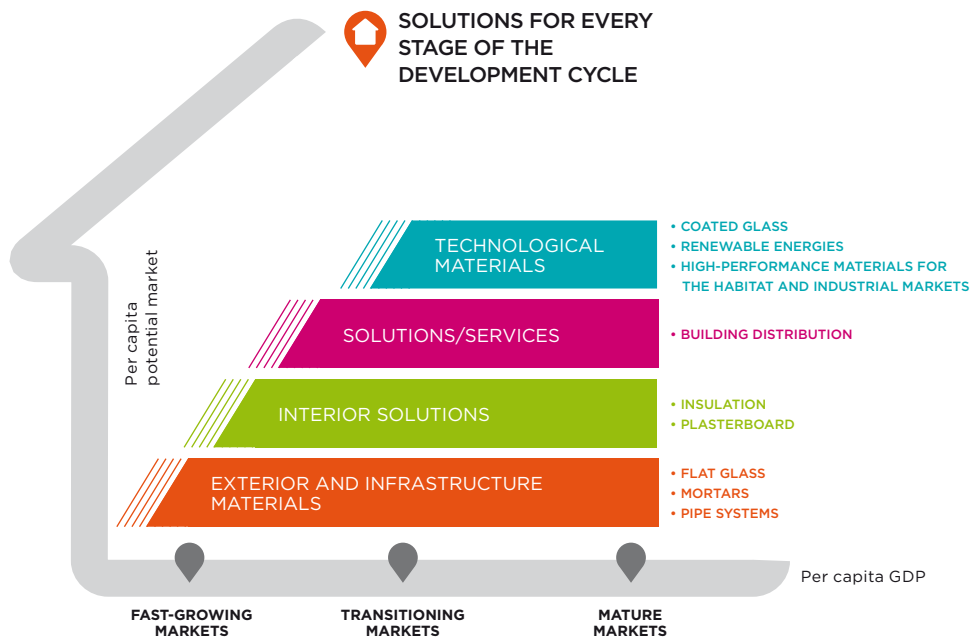
Saint-Gobain offers a comprehensive range of products and services for habitat with innovative solutions developed by activities at the forefront of technology. They can be found in manufacturing, medicine and transportation.



See the corporate video

# A WORLDWIDE PRESENCE, LOCAL RESPONSES

By proposing solutions for markets at all stages of development, Saint-Gobain captures opportunities in expanding sectors in both mature and fast-growing markets.



A manufacturing presence in 64 countries, providing a solid base for Group development.



**FRANCE**

## Energy expertise

POINT.P Matériaux de Construction has installed energy efficiency counters in nearly 80 branches to help customers with construction and energy renovation projects.

## Energy efficiency driving growth in mature countries

Saint-Gobain's markets in mature countries are driven by energy performance requirements, growing demand for comfort in homes and buildings, and the development of high-tech industrial niches. These markets are expanding more rapidly than underlying construction and renovation volumes because of more stringent building energy performance standards, which are supporting demand for sustainable, innovative building solutions.

The most recent regulations are leading to a significant increase in the use of large window surfaces in new buildings, for example, and encouraging the installation of ever more efficient insulation. In 2013, the Group's capital expenditure and acquisitions choices were focused on niche industrial markets, particularly in plastics, and distribution.



## Accelerated expansion in Asia and in fast-growing markets

In fast-growing markets, Saint-Gobain responds to the increasing demand for equipment and new residential, office and other buildings. The habitat and construction markets in these countries offer substantial growth potential due to urban development and exponentially rising

infrastructure needs. Like in mature markets, demand for high value-added construction solutions is tending to increase faster than per capita wealth or construction volumes. Saint-Gobain is strengthening its presence in all fast-growing regions, including Brazil, Colombia, India, Poland and Russia.



### COLOMBIA

#### Highest float line in the world

Colombia's first flat glass furnace came on stream in Soacha. Operated by Vidrio Andino, a joint venture between Saint-Gobain and NSG Group, this is Saint-Gobain's highest float line in the world.



### BRAZIL

#### A Stadium for the 2014 World Cup

Saint-Gobain pipe systems, mortars and architectural membranes have been used in the Maracanã football stadium in Rio de Janeiro, which will welcome the 2014 World Cup.

### CHINA

#### New automotive glazing plant

Saint-Gobain Sekurit celebrated the commissioning of its Qingdao plant, operated in partnership with Central Glass. Qingdao is Saint-Gobain Sekurit's fourth plant in China.



# BUILDING THE HABITAT SOLUTIONS OF THE FUTURE

The habitat and construction markets are undergoing a real transformation in which Saint-Gobain is a leading player.



## Improving energy efficiency

Saint-Gobain develops solutions that make buildings more energy efficient and help to protect the planet. Most of its solutions, such as glass products, mineral wool insulation, plasterboard, exterior wall and floor coating mortars, already help to make buildings more energy efficient and will contribute further to their performance in the future.



## Making comfort accessible to all

The buildings of the future will offer all types of comfort. People want to be able to make themselves at home in a safe, comfortable, healthy place that protects them from the aggressions of the outside world. Saint-Gobain offers esthetic solutions such as glazing, colored mortar and paintable wall coverings, as well as solutions to improve air quality, lighting management, and acoustic comfort (ceilings and plasterboard).



## Working alongside construction industry professionals

The buildings of the future will be developed in partnership with all construction industry players. A new generation of contractors capable of using energy-efficient construction techniques will have to be trained. Saint-Gobain is committed to helping customers and partners embrace these green principles by leveraging the power of its distribution networks. In line with this commitment, the Group pursued its broad-based program to train builders in the latest energy-saving techniques and solutions in 2013.



## Saint-Gobain Multi-Comfort: a demonstration of our know-how

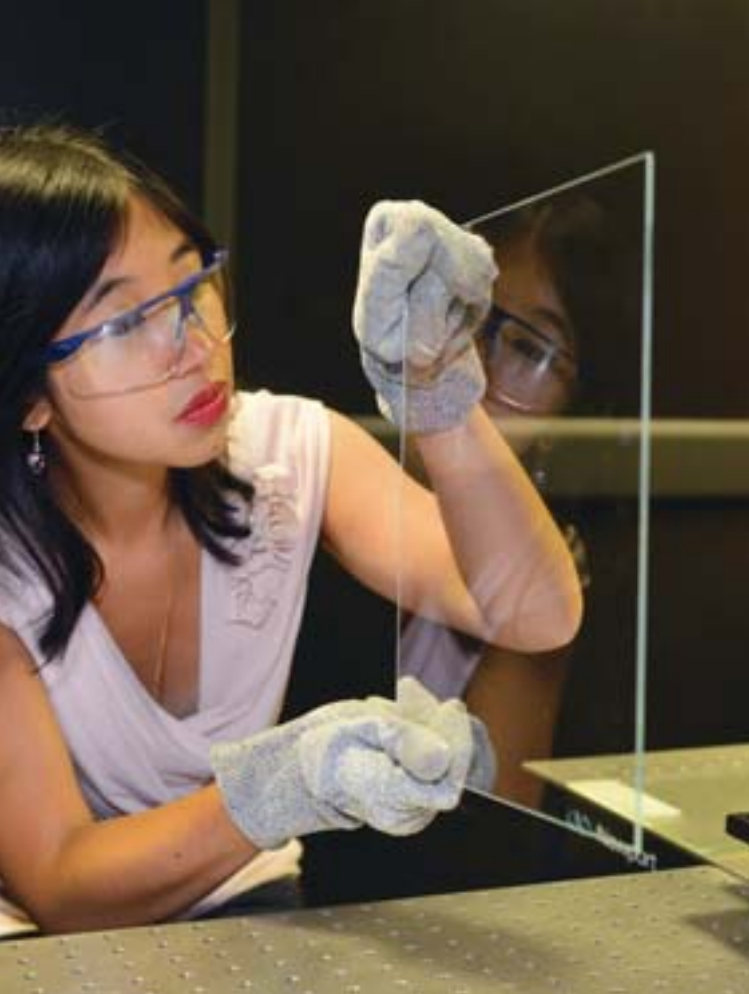
Saint-Gobain does not construct buildings, it equips them with differentiating, high value-added solutions. Numerous Group businesses have joined forces to promote the Multi-Comfort concept in 13 countries. With this concept, Saint-Gobain is proposing a new way of constructing buildings and providing a common frame of reference that takes into account each country's specific features while anticipating new regulations. The concept is based on a Multi-Comfort scorecard that focuses on five types of comfort and aims to minimize environmental impacts.



**FRANCE**  
**Sustainable renovation**  
Saint-Gobain is involved in an experimental project to rehabilitate a social housing complex in Villeneuve-Saint-Georges near Paris.



**RUSSIA**  
**Priority to training**  
The Group has opened the Saint-Gobain Academy training center in Moscow focused on developing the Multi-Comfort concept nationwide.





# INNOVATION, **AN ESSENTIAL ELEMENT**

Research and innovation are at the heart of Saint-Gobain's strategy. The Group's research focuses on both breakthrough innovations and continuous improvements to products, processes and services, in a spirit of openness and attentiveness to customer needs.

# SAINT-GOBAIN, ONE OF THE 100 MOST INNOVATIVE COMPANIES IN THE WORLD\*

R&D BUDGET  
OF NEARLY  
**€430m**

CLOSE TO  
**900**  
RESEARCH  
PROJECTS

NEARLY  
**400**  
PATENTS FILED  
EACH YEAR

**3,700**  
PEOPLE

## **CHINA** Extension

The Shanghai research center has been expanded to provide room for up to 400 researchers. Saint-Gobain is strengthening its innovation capacity close to its Asia-Pacific markets.

Research and innovation are at the heart of Saint-Gobain's habitat solutions strategy and sustainable development policy. Ongoing initiatives to develop the Group's innovation culture are clearly producing results: for the third year in a row, Saint-Gobain ranked among Thomson Reuters' Top 100

Global Innovator Companies. The Group intends to pursue its efforts in the years ahead - notably in terms of investment - to maintain and extend its leadership positions in its Activities and sustain a high level of performance and operating excellence.



\* Source: Thomson Reuters 2013 Top 100 Global Innovator Companies



**12 RESEARCH CENTERS**  
and around 100 development units worldwide

**7 CROSS-FUNCTIONAL R&D CENTERS**



**STRATEGIC PROGRAMS**

- Active glass
- High-performance insulation systems
- External wall insulation systems
- Flexible functional films
- Lighting
- Energy efficiency and the environmental impact of processes
- Fuel cells

**1 IN 4 SAINT-GOBAIN PRODUCTS SOLD TODAY WAS DEVELOPED IN THE LAST FIVE YEARS.**



# DEVELOPING A CULTURE OF ECO-INNOVATION

Saint-Gobain has set the goal of conducting life cycle assessments for all of its building industry product ranges. Once the environmental footprint has been measured, the Group intends to reduce the environmental impact of these products while creating value. This culture of eco-innovation is gradually being extended to all of the Group's businesses, in all markets.

Beyond this goal, the challenge at Saint-Gobain is to develop solutions that significantly reduce

the environmental impact of the buildings and infrastructure that use them.

The Group is also working on reducing the environmental footprint of its industrial processes. Similarly, special attention is paid to product recycling. Concerning the shipping of materials, Group researchers are using their skills to develop models for more efficient and environmentally friendly shipping processes.

## THE LIFE CYCLE ASSESSMENT OF A CONSTRUCTION PRODUCT





# Eco-innovative products in all markets



### Lighter weight adhesives

Saint-Gobain Weber's **weber.col confort** tiling adhesives are just as effective as traditional adhesives, but their lighter weight means substantial savings in shipping costs, as well as significantly reduced CO<sub>2</sub> emissions and related waste.

### Biosourced tubing

Saint-Gobain Performance Plastics has created Tygon® S3™, a new range of partially biosourced, phthalate-and bisphenol A-free tubing used in particular in the food and beverage industry.



### Revolutionary windshields

The SGS CoolCoat heat reflective windshield and the SGS Lightweight windshield from Saint-Gobain Sekurit help improve vehicles' energy performance.



### Grinding wheels that save energy

Saint-Gobain Abrasives' Norton® Vitrium<sup>3</sup> grinding wheels are designed to shape metal. They are manufactured at a lower temperature, thereby saving energy and reducing carbon dioxide emissions.



### Eco-designed jars

Verallia's Platinum jars combine ergonomic design with a minimal environmental footprint.



# AN ORGANIZATION ATTUNED TO MARKET NEEDS



## FRANCE

### A world of glass for interior decoration

Based on a new concept, “A Glass House” in Paris now presents all Saint-Gobain’s glass solutions and products for interior finishing and decoration. Unique in France, it includes a meeting space and gallery to inspire both professionals and homeowners.

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Cross-business Habitat organizations, present in 38 countries, foster dialogue among teams involved in research and marketing and help implement inter-Activity innovation projects. The number of cross-business innovation projects is on the rise, from laminated-glass-inspired Duo’Tech® plasterboard to slip-resistant coating Lite-Floor Xtra Grip, which combines a glass binder and an abrasive.

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Saint-Gobain’s culture of partnership and co-development is strengthened by close collaboration with customers or external partners. The Group also keeps a close eye on new markets through NOVA External Venturing, a unit dedicated to external innovation and responsible for relations with start-ups. In addition, Saint-Gobain has numerous partnerships with scientific and academic institutions.

## Just like in real life

Saint-Gobain is developing capabilities in simulation, virtual reality and augmented reality to support its researchers, professional customers and these customers' own customers.



### External walls

Saint-Gobain Weber has developed a tool to visualize an external thermal insulation system (ETICS). With this tool, customers can get a realistic view of what their house will look like after renovation and obtain the necessary information to implement the insulation solution.



### Stairs

Lapeyre has developed Vizea, an interior staircase sales application that selects a given Lapeyre staircase, customizes it and presents the result.



### Interior glazing

Saint-Gobain Glass's Glass Vision application uses augmented reality technology to present more than 70 interior glazing solutions in the customer's actual environment.

# AN ORGANIZATION ATTUNED TO MARKET NEEDS

## Partnership innovations



### Lighting fabrics

Saint-Gobain Adfors' exclusive Oniryts™ lighting fabrics were developed in partnership with Brochier® Technologies by combining fiberglass and fiber optics using Lightex® technology. Customizable Oniryts™ invites designers to use light as a living, flexible and mobile material.

### Unique combination of insulating materials

Saint-Gobain ISOVER and wood fiber specialist Buitex have developed Isoduo 36, the first insulation product that combines glass wool and wood fiber.



### Distributing an innovation

POINT.P Travaux Publics has become the exclusive distributor, for a three-year period, of Cimtex, an innovative product created by start-up Concrete Canvas. This flexible, concrete impregnated fabric hardens when hydrated to form a thin concrete layer.

### Tougher pipes

Saint-Gobain PAM and Kerneos, the world leader in calcium aluminates technology, have developed an internal coating for sewage pipes called BIOGAN that is resistant to biogenic corrosion, even in hot and dry countries.



# RESEARCH THAT ANTICIPATES FUTURE CHALLENGES

Innovation is the Group's greatest differentiating strength in the face of growing competition and numerous new players in its markets.

For high value-added products, Saint-Gobain's ability to combine cutting-edge technology and design is often a major advantage for enhancing its leadership position.

In markets where the competition is concentrated on low cost offers, continuous innovation to reduce production costs and offer increasingly effective customer service is the only way to stay competitive.

Creating new high-performance products in fast-growing markets, such as electronics, is also a major competitive challenge for Saint-Gobain.

## HUMAN RESOURCES

### Researchers, a driving force

Research is a valuable talent pool and source of attractiveness for Saint-Gobain's Activities.







# A LONG-TERM **CORPORATE MISSION**

In pursuing its corporate mission, Saint-Gobain draws on values forged by nearly 350 years of history. The Group's ambition of being the reference in its professions brings with it a certain number of duties. That is why Saint-Gobain wants to set the example in its conduct and behavior and raise awareness of the challenges of sustainable development among internal and external stakeholders.

# SAINT-GOBAIN, A COMMITTED COMPANY

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## International commitments

Saint-Gobain joined the United Nations Global Compact in 2003 and signed the declaration of management support for human rights in 2008. In 2009, the Group endorsed the Caring for Climate statement and the CEO Water Mandate, two documents that complement the UN Global Compact.



## Nine binding principles

The values of professional commitment, respect for others, integrity, loyalty and solidarity shape the **conduct** of every member of Saint-Gobain.

Respect for the law and caring for the environment, workplace health and safety and employee rights guide the **actions** of all employees in the performance of their duties.

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Saint-Gobain's commitment to Corporate Social Responsibility (CSR) is based on values forged by nearly 350 years of history.

Nine binding Principles of Conduct and Action guide employees in their daily work. Adherence to these Principles is a requirement for belonging to the Group. In early 2014, the Strategy

Committee was given responsibility for Corporate Social Responsibility.

Saint-Gobain interacts with a very large number of stakeholders. At both the corporate and local levels, its teams listen carefully and organize constructive dialogue in application of the subsidiarity principle.

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## VALUES

### Setting the example

The Group expects exemplary conduct and practices from its teams, both internally and externally.





# A CORPORATE SOCIAL RESPONSIBILITY POLICY WITH FIVE KEY AREAS



No. 1

## Invent sustainable buildings

Saint-Gobain offers solutions for sustainable buildings in all its host countries. The Group adapts its responses by taking into account the different needs and diverse markets in both mature and fast-growing countries for renovation and newbuilding, and for commercial and residential buildings. The Group is committed to making sustainable buildings the norm rather than the exception.



No. 2

## Limit environmental impacts

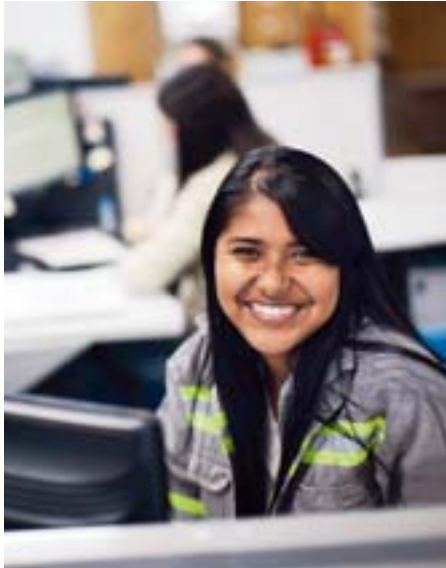
Saint-Gobain teams are focused on achieving the only acceptable objective, which is zero environmental accidents and a minimum impact on the environment from its activities. Achieving this objective means making sites more energy efficient, preserving natural resources (notably water) throughout the production process, reducing atmospheric emissions and recycling waste.

# A CORPORATE SOCIAL RESPONSIBILITY POLICY WITH FIVE KEY AREAS



No. 3

## Encourage employees' professional growth



The Group pays close attention to preserving employees' health and safety. Saint-Gobain's ambition with regard to human resources, as formulated in the OPEN program, is to support the Group's corporate project to give meaning to everyone's actions while ensuring well-being and performance in the workplace.

### Four priorities of Human Resources policy

- **Increase professional mobility** (geographic, functional and inter-Activity).
- **Promote all types of diversity** (nationalities, gender, generations, training and career backgrounds).
- **Foster employee commitment** by broadening career horizons with diversified missions and growth paths and by moving people up the ladder more quickly.
- **Develop talent by identifying** open, innovative profiles and offering all employees appropriate training.



No. 4

## Support community development



Saint-Gobain is a multiregional organization serving local markets. Its investments contribute to job creation and to local economic development. The Group also deploys initiatives to promote the social and economic development of its job catchment areas, as well as community outreach programs.

## The Saint-Gobain Initiatives International Corporate Foundation

### Three areas of action aligned with the Group's strategy

- Preparing young people for jobs in the habitat and construction industry.
- Construction, refurbishment or renovation of social housing, for general interest purposes.
- Energy efficiency and environmental protection in social housing.

**80 SPONSORS** drawn from among active and retired Saint-Gobain employees have supported the Saint-Gobain Initiatives Foundation's projects since it was created in 2008.



#### GERMANY

### Specialists in insulation

The Foundation helped finance a training course for young job seekers tracked by association AAW (Arbeitskreis für Aus und Weiterbildung). Employees from Saint-Gobain ISOVER took part in the project as mentors.



#### ROMANIA

### Support for the least well-off

The Foundation supported the construction of a home for disabled persons and the renovation of a medical center, a primary school and a nursery school, as well as the construction of a cultural center for the Romani people.



#### FRANCE

### Maintaining dignity

An Emmaüs Solidarité drop-in center in Paris was renovated with the Foundation.



**No. 5**

## Take action across the value chain

Saint-Gobain's size and worldwide scope give it a special responsibility in raising partners' awareness of the challenges of sustainable development and in promoting exemplary practices. Initiatives are carried out internally, as well as externally, among customers, partners, suppliers and the general public. The Group is also a member of professional associations involved in sustainable construction.



Read more about Saint-Gobain's sustainable development initiatives in the Group's CSR report, "Building our Environment Together", at [www.saint-gobain.com](http://www.saint-gobain.com).





SERVING EACH  
MARKET  
**WITH DEDICATED  
SOLUTIONS**

- For sustainable buildings
- For cleaner transportation
- For quality healthcare
- For high-performance manufacturing



In France, K PAR K supports its customers in all their renovation projects.

## DO YOU KNOW THE GROUP'S BRANDS IN THIS MARKET?

### PRODUCT BRANDS



### MASTER BRAND



### MULTIPLE TRADE BRANDS





- 📍 **The Insulation Activity** insulates one in three houses in Europe and one in five in the United States.
- 📍 **Saint-Gobain's Vetrotech** fire-rated glass solutions can withstand fire for up to 180 minutes.
- 📍 The Industrial **Mortars Activity's** Leca® expanded clay grains are used in green roofs.
- 📍 **Saint-Gobain PAM** delivers more than 40,000 km of pipe systems on average each year.
- 📍 In France, the **POINT.P** app offers customers numerous services, including a location-aware sales outlet finder, information on product availability and on-line estimates.
- 📍 Developed by **Dahl** in Northern Europe, Klimacenter is an innovative concept dedicated to renewable energies and ventilation.
- 📍 **Raab Karcher** is a volume brand present in Germany, the Netherlands, Hungary and the Czech Republic.
- 📍 In France, **Lapeyre** publishes on its website a daily service quality report for each of its stores.



Saint-Gobain offers solutions to improve interior air quality and light management.

# FOR SUSTAINABLE BUILDINGS

Saint-Gobain offers a broad, diversified range of building materials for the newbuilding and renovation markets, providing comprehensive solutions for the building envelope all the way down to the interior fittings. These solutions are used in all types of projects, both residential (single-family homes and apartment buildings) and non-residential (offices, public buildings, stores, hotels and other facilities). These solutions contribute to the energy performance, comfort, attractiveness and environmental and health performance of buildings.

# FOR SUSTAINABLE BUILDINGS

## Habitat and construction markets:

**78%** of consolidated net sales in 2013

Of which **48%** in renovation

And **30%** in new building



UNITED STATES

## Series production of electrochromic glass

The world's first plant for the series production of SageGlass® electrochromic glass came on stream in the United States in 2013. Electrochromic glass darkens in response to an electrical charge, offering total control over solar transmission and combining protection with visual comfort and energy efficiency.



UNITED KINGDOM

## Innovation Center

In March 2013, the Group opened its new 300 square-meter innovation center in the heart of London to showcase the sustainable habitat solutions offered by Saint-Gobain companies in the United Kingdom.

## Complementary products

The **Flat Glass** Activity produces flat glass and coated glass with thermal insulation and solar control properties for the building markets. Downstream, Glassolutions processes and distributes glass for a wide range of applications, including facades, large architectural projects, windows, furniture, bathroom fittings and interior decoration. The Group also supplies specialty products such as fire-protection glass and active glass.

The **Gypsum** Activity extracts and processes gypsum to offer a broad array of products for construction and decoration, including partitions, wall coverings, ceilings and floors.

The **Insulation** Activity develops a range of products made from mineral wools (glass wool and stone wool) and from polystyrene and polyurethane foam, primarily under the ISOVER brand. These products are used to insulate the building envelope (roofs, walls and floors) and to insulate HVAC systems.

The **Industrial Mortars** Activity offers a comprehensive range of exterior wall decoration, protection and insulation solutions for the residential, commercial and industrial building markets, primarily under the Weber brand. Solutions include tile grouting, exterior wall rendering products and flooring screed.

The **Ceramics Materials** Activity supplies pigment powders for ceramic tiles. **Abrasives** are used to cut concrete walls and floors, polish wood floors or finalize decorating finishings. Films, foams and coated fabrics from the **Performance Plastics** business are also used in building projects. **Saint-Gobain Adfors'** technical fabrics include glass fiber mesh for exterior wall insulation, wall coverings, joint tapes, bonded glass fiber for thermal insulation and mosquito netting.

The **Exterior Products** Activity, whose CertainTeed brand is a leading player in the North American habitat and construction markets, offers a comprehensive array of products designed specifically for North-American-style homes, including roofing shingles, siding, fences, decks and railings.

The **Pipes Activity**, under the PAM brand, delivers end-to-end systems to the water supply market. The Activity designs, manufactures and markets ductile cast iron pipe systems, valves and hydrants, municipal castings, and wastewater and rainwater collection and drainage systems. Its cast iron underground heat exchangers ensure the circulation of fresh air in buildings in compliance with energy efficiency constraints.



## Distribution, accelerating the Group's strategy

The network of Saint-Gobain brands distributes building materials in 27 countries, serving the newbuilding, renovation and home improvement markets. The network is both powerful and complementary. Its volume and specialist brands target craftsmen, small and medium-sized enterprises, private project owners and large companies. Rooted in its local market, each brand is uniquely positioned to meet the specific needs of its customers and market. This organization, backed by dynamic, expert teams, is a valuable strength in allowing the Group to meet a wide range

of customer expectations in terms of products, services and solutions.

The Building Distribution brands play a vital role in helping contractors understand and embrace new building renovation techniques, new regulations, new markets and emerging distribution channels.

Always very attentive to their customers' needs, the brands are constantly looking for ways to provide the most efficient service and highest added value while offering the most effective

solutions. This is reflected in products and services, the supply chain, sales concepts, click and collect drive-through services, showrooms, training centers, practical guides and hands-on advice.

Saint-Gobain has an ambitious digital strategy for its brands, which continued to develop their e-commerce solutions in 2013. Alongside smartphone applications for Graham, Jewson, POINT.P and Raab Karcher, many commercial websites and applications were successfully launched during the year.

## Complete customer focus

Several Saint-Gobain brands now offer click and collect drive-through services for customers who place orders over the Internet.

- 4,400** sales outlets
- 64,000** employees in **27** countries
- 30,000** suppliers in **50** countries
- 45%** of Group purchases
- 200** million customer contacts per year



**BRAZIL**

### Expansion of distribution

Telhanorte, a brand specialized in home improvement, tiling, and bathroom and kitchen fixtures, pursued its expansion in 2013.

**FRANCE**

### Lapeyre has a makeover

Lapeyre has launched a new branch concept in Mérignac. To meet changing buying habits more effectively, two circulation plans have been laid out, one for quick service at the counter and the other for projects, with personalized advice.



**UNITED KINGDOM**

### Express service

Jewson has joined forces with an on-line delivery company to offer the world's fastest delivery service in 48 of its London branches. Customers can now receive their orders in just 90 minutes.

# SUSTAINABLE BUILDINGS

## FOR ALL HOURS OF THE DAY

### Residential buildings



#### FINLAND

##### Single-family home The Multi-Comfort house

Seven Group companies and brands were involved in equipping the first Multi-Comfort house in Finland, which features the concept's five types of comfort (thermal, acoustic, health, visual and modular and security).



#### ITALY

##### Apartment building Saint-Gobain in the center of Milan

Saint-Gobain ISOVER supplied products to rehabilitate the historic center of Milan as part of the Porta Nuova project. ISOVER glass wool panels were used, for example, in the ventilated walls of the prestigious LEED-certified Bosco Verticale residential towers.



#### BRAZIL

##### Single-family homes Dry construction solutions

Saint-Gobain in Brazil has launched a dry construction system - meaning that no water is used on the worksite - made up of Brasilit, Placo®, ISOVER and Weber products. Suitable for all types of construction, the system was first used for a housing development in Ponta Grossa, in Paraná State.



# Non-residential buildings



**INDIA**

**Offices**

**IT campus with butterfly wings**

Saint-Gobain participated in the construction of an IT park in Siruseri, a suburb of Chennai, for Tata Consultancy Services. The building facades feature 60,000 square meters of high-performance glass from Saint-Gobain Glass. The campus has been certified as eco-friendly by the Indian Green Building Council (IGBC), winning the top Platinum rating.



**CZECH REPUBLIC**

**Mall**

**The country's largest shopping center**

Saint-Gobain solutions were used to equip the 154,000 square-meter Černý Most shopping center near Prague. Ecophon supplied materials for the car parks, a cinema and a bank. Weber systems were used for external wall insulation, while ISOVER insulation solutions were deployed for fire-resistant partition walls and ceilings. Lastly, Rigips plasterboard was chosen to clad the main arteries of the shopping center.



**GERMANY**

**Museum**

**Military history museum in Dresden**

A transparent arrowhead measuring nearly 30 meters high made of glass, metal and steel was added to the German Military History Museum in Dresden during its extensive remodeling. This distinguishing feature was created using products from Saint-Gobain Glass, Saint-Gobain Rigips, Saint-Gobain Weber and Saint-Gobain ISOVER.



**ABU DHABI**

**Offices**

**Lightness in innovation**

Lightweight partition systems from Saint-Gobain Gyproc were used in the construction of the Al Bahar towers in Abu Dhabi. The towers, with their circular form, feature a revolutionary system to manage indoor temperature based on a protective skin with elements that automatically open and close depending on the intensity of sunlight.



Saint-Gobain is present in the automotive, aviation and railway market.

## DO YOU KNOW THE GROUP'S BRANDS IN THIS MARKET?



MASTER BRAND



SAINT-GOBAIN SEKURIT

SAINT-GOBAIN SULLY

SAINT-GOBAIN AUTOVER

SAINT-GOBAIN PERFORMANCE PLASTICS



Water-repellant SGS Aquacontrol glass from **Saint-Gobain Sekurit** modifies the shape of water droplets on windshields, making them rounder so that they can be more easily removed by the wiper system or the wind.

With more than 41,000 replacement glass references in its catalogue, **Saint-Gobain Autover** covers 95% of European fleet's needs.

**Saint-Gobain Performance Plastics** manufactures radomes – structural weatherproof enclosures made of composite materials that protect the antennae of weather radar systems (located in the nose of aircraft) and satellite communication systems (mounted on the fuselage roof or tail).

**Saint-Gobain ISOVER** glass wool is used for thermal and acoustic insulation in the walls, ceilings and floors of train, tramway and subway cars.



Products from Saint-Gobain ISOVER and Saint-Gobain Sekurit are featured in the railway cars of the first high-speed train line in northeastern China, connecting Harbin and Dalian.

# FOR CLEANER TRANSPORTATION

Saint-Gobain supplies high-performance products to manufacturers in the automotive, aviation and aerospace industries. The Group's innovative solutions respond to current challenges in this leading-edge sector, including achieving greater energy efficiency (notably through the use of lighter-weight materials), enhancing connectivity and addressing the specific needs of emerging markets.

# FOR CLEANER TRANSPORTATION



## Aviation

EUROPE

### Flying high with the A350

Already an exclusive supplier for the Airbus A380, Saint-Gobain Sully has also been selected to produce cockpit windows for the entire Airbus A350 XWB range. The long-haul jet, which made its maiden flight in 2013, is also equipped with silicone seals from Saint-Gobain Performance Plastics.



## Automotive industry

FRANCE

### On the road with the C4 Picasso

Saint-Gobain Sekurit is the exclusive supplier of the standard panoramic windshield, glass roof and side windows of the latest Citroën compact MPV.

**Part of the Flat Glass** Activity's output is used to manufacture automotive glazing. **Saint-Gobain Sekurit** supplies the world's major car manufacturers with windshields, side windows, rear windows, glass sun-roofs and other ready-to-assemble modules. Tempered, laminated, tinted or featuring high-performance coatings depending on their use, these products help reduce vehicles' energy consumption and respond to rising user demand for safety and comfort. Saint-Gobain Sekurit also serves other segments

of the transportation industry, with glazing products for aircraft, railcars, armored vehicles, trucks, buses, agricultural and construction machinery.

Within the **High-Performance Materials** Activity, the **Performance Plastics** business serves the transportation market with bearings, seals and foams that are used in doors, steering and braking systems, seats and engines. It also provides Solar Gard films for automotive windows and to protect body paint.

**Saint-Gobain Adfors'** glass fiber yarns are used to reinforce timing belts and clutch and braking systems, as well as for electrical insulation.

Certain products from the **Insulation Activity** are designed for technical applications in ships, trains, trams, underground rolling stock and automobiles. For cars and trucks, ISOVER has developed specific glass wool products that combine the cost efficiency and high-performance of insulation for operating temperatures of up to 550°C.



# Space

**UNITED STATES**

## On board the Delta IV

The United Launch Alliance's Delta IV rocket achieved its seventh lift-off in 2013. Saint-Gobain Performance Plastics provided high-technology OmniSeal® seals and Meldin® polyamide materials to withstand the extreme conditions encountered in space flight.

# Industrial vehicles

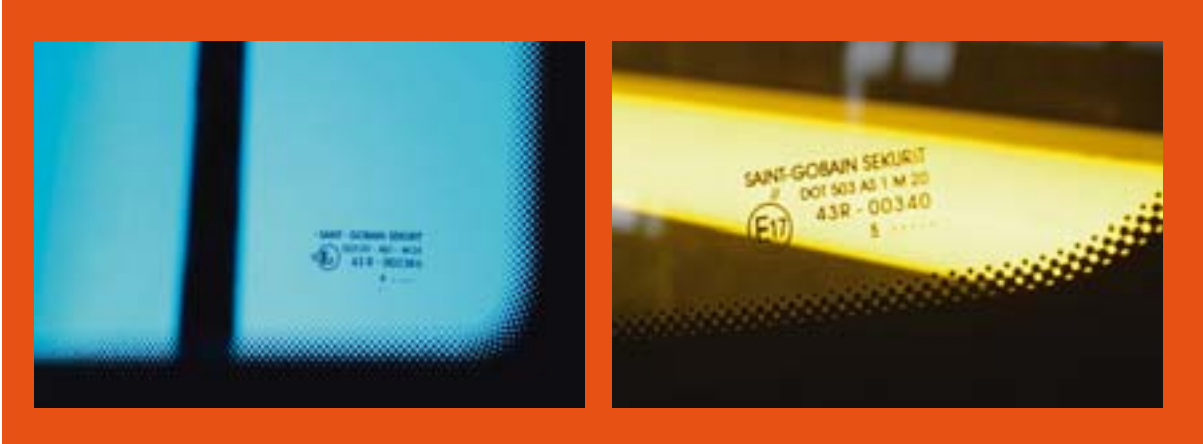
**UNITED KINGDOM**

## Local buses

Saint-Gobain Sekurit supplies glazing systems around the world, including the New Routemaster double-decker bus in London.



## HOW DO YOU RECOGNIZE SAINT-GOBAIN AUTOMOTIVE GLAZING?





Saint-Gobain high-performance plastics can be found everywhere in hospitals, pharmaceutical industries and research laboratories.

## DO YOU KNOW THE GROUP'S BRANDS IN THIS MARKET?

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TYGON<sup>®</sup>

Sani\*Tech<sup>®</sup>

MASTER BRAND



SAINT-GOBAIN PERFORMANCE PLASTICS

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- 50 million children have been vaccinated against chickenpox over a five-year period thanks to vaccines produced with Sani-Tech® tubing from **Saint-Gobain Performance Plastics**.
- The average time-to-market for a healthcare product comprising **Saint-Gobain** components is three years.
- Saint-Gobain Performance Plastics** manufactures disposable electrodes for self-monitoring blood glucose.
- Saint-Gobain Performance Plastics'** extruded silicon valves regulate the flow of drugs in pain management or chemotherapy devices used at home.



Supercontryx® glazing from Glassolutions Sovis protects against X-rays used in radiology.

# FOR QUALITY HEALTHCARE

Saint-Gobain supplies the healthcare market with high-performance plastic materials and components used in an extensive array of applications. Group products are present everywhere in hospitals, the pharmaceuticals industry and research laboratories.

# FOR QUALITY HEALTHCARE



## UNITED STATES

### A leading-edge tool

Saint-Gobain inaugurated the new silicone extrusion line at the Saint-Gobain Performance Plastics site in Beaverton, Michigan. The line is dedicated to Compass™ technology, which provides precision tolerances for tubing used in a wide variety of medical applications, including ophthalmic pumps, enteral feeding and IV therapy.

## Acquisitions

In 2013, Saint-Gobain made four acquisitions in the healthcare market:

- **Twin-Bay Medical** (United States). Among other products, the company manufactures ultra-secure flexible tube retainers and single-use systems for the biopharmaceuticals industry.
- **American Fluoroseal Corporation** (United States). The company pioneered the design of fluorinated ethylene propylene bags for medical applications, and has also developed sterile sampling systems for the manufacture of pharmaceutical products.
- **Applied Bioprocess Containers** (United States). The company specializes in the design and manufacture of single-use storage vessels designed for the preparation, collection, storage and transportation of biopharmaceutical liquids.
- **LS Kunststofftechnologie** (Germany) manufactures high-performance polymer components for the medical market, as well as automotive and industrial applications.

The Life Sciences Business Unit within the Group's Performance Plastics Activity is a world's leading provider of polymer components for the pharmaceutical, medical, and biotech markets. As a brand leader with Tygon®, C-Flex® and Sani-Tech®, a wide breadth of services are provided such as molded, extruded and custom manufactured silicone, fluoropolymer, thermoplastic elastomer products for life critical markets.

The engineered niche materials provide for barrier properties, bio-compatibility, oxygen transmission, and system design from the scientific laboratories to full scale vaccine production. These single-use solutions have strong growth potential as they are increasingly being used to replace fixed capital stainless steel systems.

Saint-Gobain Life Sciences is building on breakthrough innovations in materials and processes, as new

products account for 40% of its Life Sciences Business Unit's sales. The Activity has also favored a co-development approach with its pharmaceutical and medical customers since the beginning, because every new medicine involves the development of a new process, and therefore new production systems. This makes it important to constantly add to the range of components, which is precisely the purpose of recent acquisitions.



# Surgery

## OmniSeal® for surgical stapling

Saint-Gobain Performance Plastics supplies OmniSeal® spring-energized seals for the only full-powered, reusable, battery-operated endoscopic stapler in the world.



# Fluid systems

## The Sani-Tech® range expands

Saint-Gobain Performance Plastics has launched the Sani-Tech® Ultra-HP high-purity hose, which is ideal for bioprocessing, fluid transfer and steam-in-place/clean-in-place (SIP/CIP).



# Other Saint-Gobain products help protect your health

Novelio® Mold-X paintable wall covering from **Saint-Gobain Adfors** contains an active antimicrobial ingredient that enhances health security. It is used in particular in patient rooms, recovery rooms and non-ventilated areas in healthcare facilities.



By providing customized acoustic solutions for each room in healthcare facilities, **Saint-Gobain Ecophon** helps reduce both staff and patient stress.



Saint-Gobain provides a wide variety of products and technical solutions for the oil and gas industry.

## DO YOU KNOW THE GROUP'S BRANDS IN THIS MARKET?



MASTER BRAND

  
SAINT-GOBAIN

SAINT-GOBAIN NORPRO

SAINT-GOBAIN SEFPRO

SAINT-GOBAIN PERFORMANCE PLASTICS



-  Tolerance rings manufactured by **Saint-Gobain Performance Plastics** are mounted on the tracking arm fitted in computer hard drives.
-  **Saint-Gobain ZirPro** ceramic beads are used to grind calcium carbonate for coated papers and to obtain a satin finish on the metallic surfaces of smartphones and other consumer electronics.
-  **Saint-Gobain ISOVER** has developed a range of glass wool products that are purpose designed to help appliance manufacturers achieve top energy ratings (A+++ and A-30%).



GlasGrid® paving reinforcement from Saint-Gobain Adfors protects asphalt roads, airport runways and bridges from cracks.

# FOR HIGH-PERFORMANCE MANUFACTURING

Saint-Gobain develops solutions for numerous industries, always providing added value and a high level of technical excellence. Both heavy industry and high-tech manufacturing benefit from the Group's innovation capabilities. Industrial niches, which are ideal for co-development strategies, are sources of growth. Lastly, Verallia's packaging solutions leverage the incomparable qualities of glass to ensure end-consumers' well-being.

(excluding transportation and healthcare)

# FOR HIGH-PERFORMANCE MANUFACTURING

## Textile

### Waterfree dyeing

For DyeCoo, the world leader in waterfree dyeing, Saint-Gobain Performance Plastics supplies a specific version of its OmniSeal® seals that is particularly resistant to high pressures and very high temperatures.



## A wide variety of industrial applications

The **Ceramics Materials business** leverages its products' remarkable properties to serve numerous industries. Examples include the particularly sophisticated refractory ceramics used in glass furnaces that produce specialty glass for flat screen displays and the refractory ceramics used in the steel industry. In addition to these traditional markets, Saint-Gobain is involved in specialized activities, notably in the area of energy, where it supplies a wide variety of innovative products and technical solutions for use across the value chain in the oil and gas industry.

The **Pipes Activity** offers solutions for mining, as well as applications for industrial markets and specific markets such as hydroelectric power, anti-seismic engineering and snow cannons. In 2013, the Activity created a dedicated sales organization to harness the growing demand from these markets. **Saint-Gobain Adfors** also offers geotextile solutions for mining operations.

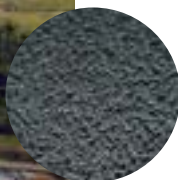
The **Abrasives business** has a full portfolio of products for each stage of the abrasion process. Its solutions are used in heavy industry (paper and steel), as well as in manufacturing and high-tech industries (automotive, aviation and electronics).

The **Performance Plastics business** supplies a variety of industries, from energy to consumer goods, with leading-edge polymer products that can be used in the most demanding applications, notably in the very fast-growing electronics sector. Examples include plastic films for flat LCD television screens or foams for assembling cell phones. With these solutions, devices are lighter, smaller and more environmentally friendly.

Within the **Flat Glass Activity**, certain companies are sharply focused on industrial markets. Glassolutions Sovis, for example, is specialized in industrial optics and refrigeration. In the area of home appliances, Euroveder manufactures glass for ovens and refrigerators, while EuroKera (a joint venture with Corning SAS) is the worldwide co-leader in glass ceramic cooktops.

Within the **Gypsum Activity**, Saint-Gobain Formula offers industrial molding plasters for various applications, ranging from ceramics (molds for sinks, dishware, etc.) to dental prosthetics and tire manufacturing.

The **Insulation Activity** delivers appropriate solutions for industrial processes, equipment and plants, notably for the oil and chemicals industries. ISOVER products guarantee high levels of thermal performance in response to cost and environmental requirements, but are also designed to withstand temperatures of more than 700°C while providing excellent acoustic performance to help attenuate plant noise. ISOVER solutions also meet certain specific insulation needs for home appliances, such as ovens and refrigerators.



## Energy

### New proppants line

In 2013, the world's largest proppants production line was inaugurated by Saint-Gobain in Little Rock, Arkansas (USA). Proppants are spherical ceramic beads used in the oil and gas industry to increase well yield.



## Glass furnaces

### New developments for refractories

Saint-Gobain SEFPRO has unveiled an innovative solution for recycling refractories, as well as a new range of chrome refractories, which are found in particular in furnaces used to produce glass for glass wool insulation. Saint-Gobain SEFPRO has developed a recycling system that processes 100% of chrome-containing waste while complying with all international EHS standards. Backed by this innovative process, Saint-Gobain SEFPRO has redesigned its refractory range using high-performance materials that are even more environmentally friendly.

## Appliances

### Colorful kitchens

EuroKera has developed a new generation of black glass ceramic cooktops called KeraSpectrum® that can display different functions, such as the timer or heat indicator, in color.



**10,000** customers in **45** countries  
**24** billion bottles and jars produced in 2013  
**13** innovation prizes for Verallia products in 2013



### BRAZIL

#### Runaway success for glass bottles

The glass milk bottles manufactured by Verallia for Vitallatte Laticínios have been very successful in Rio de Janeiro and São Paulo.



### FRANCE

#### Bouquet of roses

In France, Verallia manufactures the Soirée A Rosé bottle for Gérard Bertrand, a celebrated winemaker in the Languedoc-Roussillon region.

The winner of Verallia's student design contest came up with its original rose-shaped-base design.

Saint-Gobain's Packing Sector, operating under the Verallia brand, is a world leader in glass containers for the food and beverage industry. Verallia offers its customers highly innovative glass container solutions and services to support their growth in future markets over the long term.

Verallia holds forefront positions in all of its markets: still and sparkling wines, spirits bottles and food jars (used for

soluble products, yogurts and other dairy products, preserves, baby food, etc.), but also beer and soft drink bottles.

Verallia supports its customers in new markets with bottles and jars featuring ever more original shapes and innovative designs. Determined to propose differentiating products, Verallia's teams create highly attractive glass containers by playing with product themes as well as colors and shapes.

In 2013, thirteen prizes for innovation were awarded to glass containers designed by Verallia.

Verallia works closely with customers to design and co-develop specific products. It has thirteen design and development laboratories worldwide in which it can collaborate with customers on new bottle and jar projects, going so far as to simulate their products on store shelves.





**FRANCE**

**New furnace in Cognac**

A new furnace has come on stream at the Verallia plant in Cognac to produce bottles for the regional wine market.



**HOW DO YOU RECOGNIZE A VERALLIA BOTTLE?**



- |         |           |       |       |         |
|---------|-----------|-------|-------|---------|
| France  | Portugal  | Italy | Spain | Germany |
| S G VOL | CM        | M     | W     | O       |
| Brazil  | Argentina | Chile | Ecova |         |
| SOV     | *         | SGE   | CO    |         |

# FINANCIAL HIGHLIGHTS

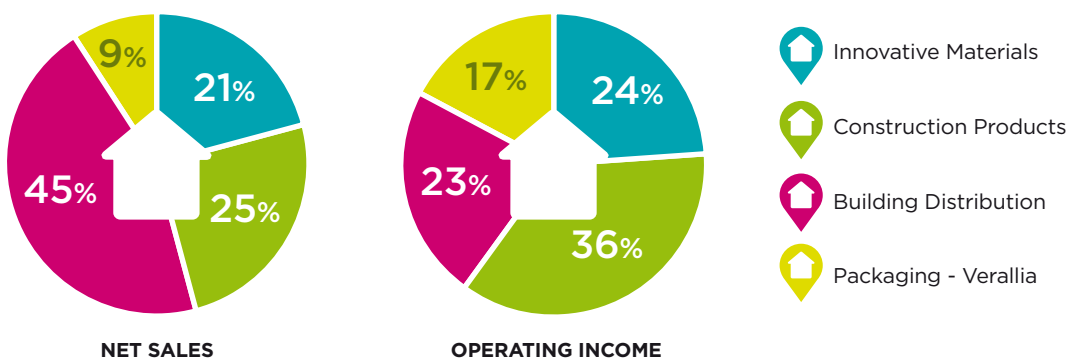
(million EUR)	2013
<b>NET SALES</b>	<b>42,025</b>
Operating income	2,764
Consolidated net income	631
Recurring net income <sup>(1)</sup>	1,027
Recurring earnings per share (in €) <sup>(1)(2)</sup>	1.85
Net income attributable to equity holders of the parent	595
Earnings per share (in €) <sup>(2)</sup>	1.07
Total investments <sup>(3)</sup>	1,454
Consolidated equity (including minority interests)	17,870
Net debt	7,521
Non-current assets	27,927
Working capital	5,024

(1) Excluding capital gains and losses on disposals, asset write-downs and material non-recurring provisions.

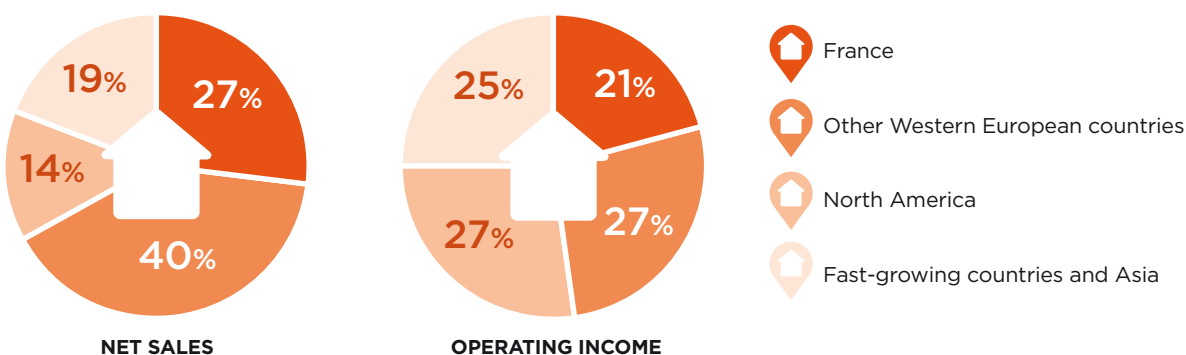
(2) Earnings per share are calculated based on the number of shares outstanding at December 31.

(3) Capital expenditure and financial investments, excluding share buybacks.

## BY SECTOR



## BY GEOGRAPHIC AREA



**Compagnie de Saint-Gobain share, shares are traded on the Euronext Paris market (ISIN FR 0000 125007).**

As of December 31, 2013, the Company represented:

- **the 21st largest market capitalization** (at €22,191 million);
- **the 18th most actively traded stock** on this market, with an average daily trading volume of 1,815,475 shares during the year.

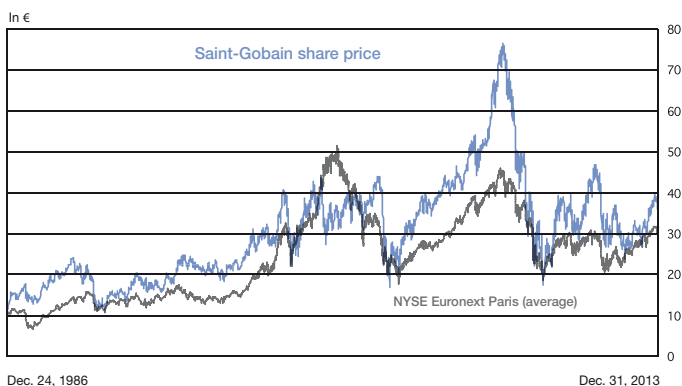
The Saint-Gobain share also trades on the main European markets: Frankfurt, London, Zurich, Amsterdam and Brussels.

**The Saint-Gobain share is included in the following indices:**

- DJ Eurostoxx 50 (50 largest market capitalizations in the Euro zone);
- the Global Dow (150-stock index of corporations in traditional and innovative industries);
- the STOXX® Global ESG Leaders, Euronext Vigeo Europe 120, Euronext Vigeo Eurozone 120, ESI Excellence Europe and FTSE4Good sustainable development indices.



**SAINT-GOBAIN SHARE PRICE**



**SHAREHOLDER BASE**

In %	December 31, 2013	
	Capital Stock	Voting rights
Wendel	16.2	25.8
Employees, through the Group Savings Plan	7.5	11.3
Caisse des Dépôts et Consignations	2.3	2.9
Treasury stock	0.6	0.0
Others	73.4	60.0
<b>TOTAL</b>	<b>100</b>	<b>100</b>



TO FIND OUT MORE, GO TO [www.saint-gobain.com](http://www.saint-gobain.com)

INVESTOR RELATIONS DEPARTMENT:  
[actionnaires@saint-gobain.com](mailto:actionnaires@saint-gobain.com)

# CORPORATE GOVERNANCE

AS OF FEBRUARY 17, 2014



## CORPORATE DEPARTMENT MANAGEMENT

### **Gérard Aspar**

*Vice-President, Marketing*

### **Sophie Chevallon**

*Vice-President, Communications*

### **François Michel**

*Vice-President, Corporate Planning*

### **Didier Roux**

*Vice-President, Research & Development and Innovation*

## SECTOR MANAGEMENT

### **Benoît Bazin**

*President, Building Distribution Sector*

### **Patrick Dupin**

*President, Flat Glass Activity (Innovative Materials Sector)*

### **Jean-Pierre Floris**

*President, Packaging Sector*

### **Jean-Pierre Floris** <sup>(2)</sup>

*President, High-Performance Materials Activity (Innovative Materials Sector)*

### **Claude Imauven**

*President, Construction Products Sector*

## GENERAL DELEGATES as of February 17, 2014

### **Dominique Azam**

*General Delegate for Mexico, Central America, Venezuela, Colombia, Ecuador and Peru*

### **John Crowe**

*General Delegate for North America*

### **Hartmut Fischer**

*General Delegate for Central Europe*

### **Javier Gimeno**

*General Delegate for the Asia-Pacific region*

### **Peter Hindle**

*General Delegate for the United Kingdom, Ireland, South Africa, Mozambique, Namibia and Zimbabwe*

### **Benoit d'Iribarne** <sup>(3)</sup>

*General Delegate for Brazil, Argentina and Chile*

### **Thierry Lambert**

*General Delegate for the Nordic Countries and Baltic States*

(1) Since July 1, 2013.

(2) To be replaced by Benoit d'Iribarne as from July 1, 2014.

(3) To be replaced by Thierry Fournier as from July 1, 2014.



## SENIOR MANAGEMENT

From left to right and from top to bottom.

**Pierre-André de Chalendar\***  
Chairman and Chief Executive Officer

**Peter Hindle <sup>(1)</sup>**  
Senior Vice-President

**Benoît Bazin**  
Senior Vice-President

**Claude Imauven**  
Senior Vice-President

**Jean-Claude Breffort**  
Senior Vice-President

**Claire Pedini\***  
Senior Vice-President

**John Crowe**  
Senior Vice-President

**Jean-François Phélizon**  
Senior Vice-President

**Jean-Pierre Floris**  
Senior Vice-President

**Antoine Vignial\***  
Corporate Secretary in charge  
of Corporate Social Responsibility

**Laurent Guillot\***  
Chief Financial Officer

\* Members of the Executive Committee

## GENERAL DELEGATES *(continued)*

**Anand Mahajan**  
General Delegate for India,  
Sri Lanka and Bangladesh

**François-Xavier Moser**  
General Delegate for Poland,  
Bulgaria and Romania

**Gonzague de Pirey**  
General Delegate for Russia,  
Ukraine and the C.I.S.

**Ricardo de Ramón García**  
General Delegate for Spain, Portugal,  
Morocco, Algeria and Tunisia

**Tomáš Rosak**  
General Delegate for the Czech Republic,  
Slovakia, Hungary and the Eastern  
Adriatic countries

**Gianni Scotti**  
General Delegate for Italy, Greece,  
Egypt, Turkey and Libya

## BOARD OF DIRECTORS *As of February 1, 2014*

**Pierre-André de Chalendar**  
Chairman and Chief Executive Officer  
of Compagnie de Saint-Gobain

**Isabelle Bouillot**  
Chairman of China Equity Links

**Jean-Martin Folz**  
Corporate Director

**Bernard Gautier**  
Member of the Management Board of Wendel

**Anne-Marie Idrac**  
Former Secretary of State for Foreign Trade,  
Consultant

**Sylvia Jay**  
Corporate Director

**Pamela Knapp**  
Member of the Management Board  
and Chief Financial Officer  
and Administrative Director of GfK SE

**Agnès Lemarchand**  
Executive Chairman of Steetley  
Dolomite Limited

**Frédéric Lemoine**  
Chairman of the Management Board of Wendel

**Gérard Mestrallet**  
Chairman and Chief Executive Officer  
of GDF Suez

**Jacques Pestre**  
Senior Vice-President of POINT.P, Chairman  
of the Supervisory Board of the Saint-Gobain  
PEG France corporate mutual fund

**Olivia Qiu**  
Chief Strategy and Innovation Officer of Philips  
Lighting, Executive Vice-President of Philips

**Denis Ranque**  
Chairman of the Board of Directors  
of Airbus Group

**Gilles Schnepf**  
Chairman and Chief Executive Officer  
of Legrand

**Jean-Dominique Senard**  
Chief Executive Officer of Michelin

**Philippe Varin**  
Chairman of the Managing Board  
of Peugeot S.A.

**Board Secretary: Antoine Vignial**  
Corporate Secretary of  
Compagnie de Saint-Gobain

Shareholders will be asked to re-elect Pierre-André de Chalendar  
at the Annual General Meeting on June 5, 2014.

## ADDRESSES

<p><b>COMPAGNIE DE SAINT-GOBAIN FRANCE</b> Head Office</p>	<p><b>Head office</b> Les Miroirs- 18, avenue d'Alsace F-92400 Courbevoie Mailing address: Les Miroirs 92096 La Défense Cedex France Tel.: +33 (1) 47 62 30 00 www.saint-gobain.com</p>
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<p><b>CONSTRUCTION PRODUCTS</b></p>	<p>Tel.: +33 (1) 47 62 45 00</p>
<p><b>BUILDING DISTRIBUTION</b></p>	<p>Tel.: +33 (1) 47 62 53 00</p>
<p><b>PACKAGING</b></p>	<p>Tel.: +33 (1) 47 62 38 00</p>
<p><b>CENTRAL EUROPE</b></p>	<p><b>General Delegation</b> Viktoriaallee 3-5 52066 Aachen Germany Tel.: +49 (241) 51 60 www.saint-gobain.de</p>
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<p><b>UNITED KINGDOM REPUBLIC OF IRELAND SOUTH AFRICA, MOZAMBIQUE, NAMIBIA &amp; ZIMBABWE</b></p>	<p><b>General Delegation</b> Saint-Gobain House Binley Business Park Coventry CV3 2TT United Kingdom Tel.: +44 (0) 2476 56 0700 www.saint-gobain.co.uk <b>Office in South Africa</b> Regional Head Office 77 Ostend Road Germiston South South Africa Tel.: +27 (0) 11 345 5300 www.saint-gobain.co.za</p>
<p><b>SPAIN, PORTUGAL, MOROCCO, ALGERIA &amp; TUNISIA</b></p>	<p><b>General Delegation</b> C/ Principe de Vergara 132 28002 Madrid Spain Tel.: +34 (91) 397 20 00 www.saint-gobain.es</p>
<p><b>POLAND, ROMANIA, BULGARIA</b></p>	<p><b>General Delegation in Poland</b> Iris Ul. Cybernetyki 9 02-677 Warsaw Poland Tel.: +48 (22) 653 79 00 www.saint-gobain.pl <b>Office in Romania</b> Floreasca Park, Sos. Pipera 43 Building A, 3<sup>e</sup> étage Offices 25 - 41 Bucharest 2 Romania Tel.: + 40 21 207 57 00 www.saint-gobain.ro</p>
<p><b>CZECH REPUBLIC, SLOVAKIA, HUNGARY &amp; EASTERN ADRIATIC REGION</b></p>	<p><b>General Delegation (Central Europe area)</b> Počernicka 272/96 Prague 108 03 Czech Republic Tel.: + 420 296 411 758 www.saint-gobain.cz</p>
<p><b>ITALY, EGYPT, GREECE, TURKEY &amp; LIBIA</b></p>	<p><b>General Delegation</b> Via E. Romagnoli, 6 20146 Milan Italy Tel.: +39 (0) 2 42 431 www.saint-gobain.it <b>Office in Egypt</b> 66, Cornish einil, Zahret ElMaadi Tower, Maadi - Heiwan Egypt Tel.: +202 (252) 88 070</p>
<p><b>RUSSIA, UKRAINE &amp; CIS COUNTRIES</b></p>	<p><b>General Delegation</b> Lefort Business Centre Rue Elektrozavodskaya, 27 Bld. 3D. 107023 Moscow Russia Tel.: +7 (499) 929 55 70 www.saint-gobain.com</p>
<p><b>NORTH AMERICA</b></p>	<p><b>General Delegation</b> 750 E Swedesford Road PO Box 860 Valley Forge, PA 19482-0101 United States Tel.: +1 (610) 341 70 00 www.saint-gobain-northamerica.com</p>
<p><b>BRAZIL, ARGENTINA &amp; CHILE</b></p>	<p><b>General Delegation</b> Avenida Santa Marina, 482 Agua Branca SP 05036-903 São Paulo Brazil Tel.: +55 (11) 2246 7622 www.saint-gobain.com.br</p>
<p><b>MEXICO, CENTRAL AMERICA, COLOMBIA, VENEZUELA, ECUADOR &amp; PERU</b></p>	<p><b>General Delegation</b> Horacio n° 1855-502 Colonia Polanco Delegación Miguel Hidalgo 11510 Mexico DF Mexico Tel.: +52 (55) 52 79 16 00 www.saint-gobain.com.mx</p>
<p><b>ASIA-PACIFIC</b></p>	<p><b>General Delegation</b> 7F, Office Tower, Bund Center 222 Yan An East Road Shanghai 200001 People's Republic of China Tel.: +86 (21) 63 61 88 99 www.saint-gobain.com.cn <b>Office in Japan</b> Saint-Gobain Bldg 3-7 Kojimachi, Chiyoda-ku 102-0083 Tokyo Japan Tel.: +81 (3) 32 88 63 10 www.saint-gobain.co.jp <b>Office in South Korea</b> Youngpoong Building 15<sup>th</sup> Floor, 33, Seorin-dong, Jongno-gu Seoul 110-752 South Korea Tel.: +82 2 3706 9071 www.hanglas.co.kr <b>Office in Thailand (Southeast Asia)</b> 12F, Gypsum Metropolitan Tower 539/2, Si Ayutthaya Road, Thanonphayathai, Ratchathewi Bangkok 10400 Thailand Tel.: +66 2 640 8716 www.saint-gobain.co.th <b>Office in Australia</b> 15 Edgars Road, Thomastown VIC 3074 Australia Tel.: +61 3 93 58 61 00 www.saint-gobain.com.au</p>
<p><b>INDIA, SRI LANKA &amp; BANGLADESH</b></p>	<p><b>General Delegation</b> Level 5, Leela Business Park, Andheri Kurla Road, Andheri (East) Mumbai - 400059 India Tel.: + 91 (022) 40 21 21 21 www.saint-gobain.co.in</p>

1. Saint-Gobain employees.
2. Nieuwegein City Hall in the Netherlands, in competition for the Gypsum Activity's 2012 International Awards.
3. Lancaster University Sports Center in the United Kingdom, rated BREEAM Excellent and equipped with Saint-Gobain Glass glazing.
4. Apartment in Vienna, Austria, renovated using Saint-Gobain interior insulation solutions to achieve passive house performance.



1. Researcher at the R&D center in Chantieraine, France.
2. CLIP-IN glass partitions from Glassolutions.
3. Aircraft radomes made by Saint-Gobain Performance Plastics.
4. Technician preparing to fire a refractory at the research center in Cavillon, France.

Cover of the Corporate Social Responsibility Report



1. K PAR K customers in France.
2. Insulating window featuring high-performance glazing from Saint-Gobain Glass.
3. Terminal 2 at the Dublin airport in Ireland equipped with products from Saint-Gobain Glass, Glassolutions and Gyproc.
4. Norton sandpaper.



This document is available online at [www.saint-gobain.com](http://www.saint-gobain.com)

Communications Department of Compagnie de Saint-Gobain/Designed and produced by: **eurokapi** - May 2014.

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