



umicore
materials for a better life

Introducing Umicore

2019

Who we are

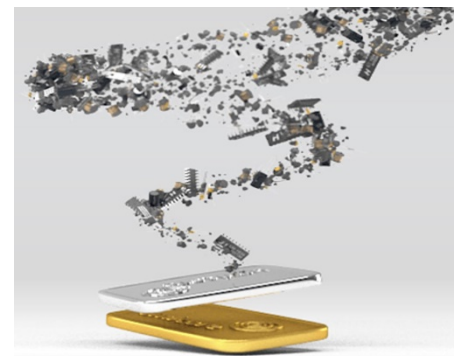
A global materials technology and recycling group



One of three global leaders in emission control catalysts for light-duty and heavy-duty vehicles and for all fuel types



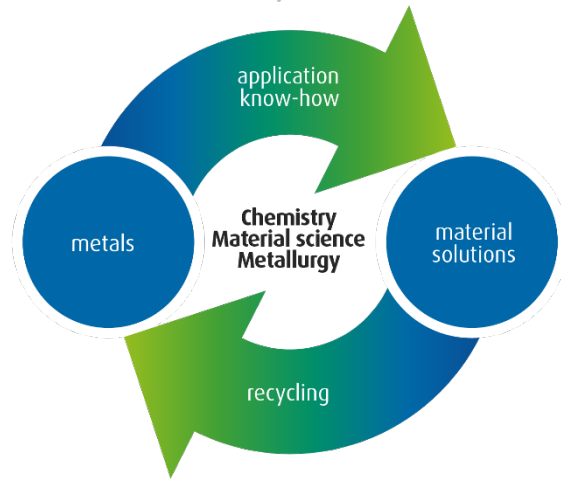
A leading supplier of key materials for rechargeable batteries used in electrified transportation and portable electronics



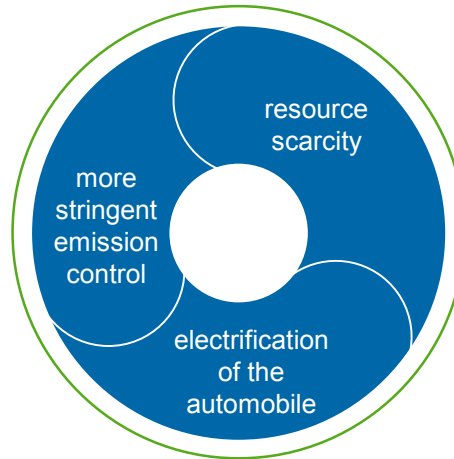
The world's leading recycler of complex waste streams containing precious and other valuable metals

Our foundations

Unique business model



Supportive megatrends



Industry leader in sustainability



Our strategy

horizon 2020

By 2020 we have...



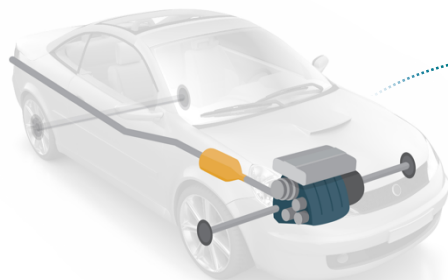
clear leadership in
clean mobility
materials and recycling

turned sustainability
into a greater
competitive edge

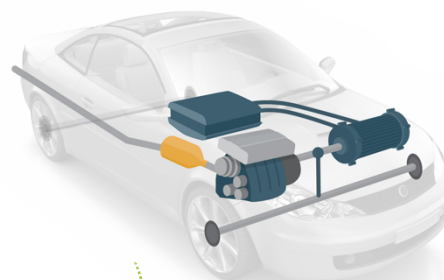


Unique position in clean mobility materials

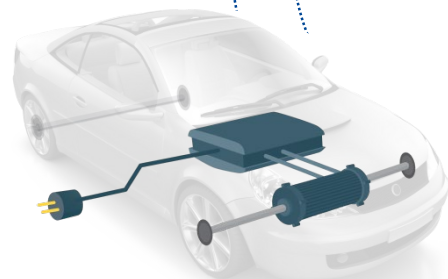
ICE
Emission control
catalysts



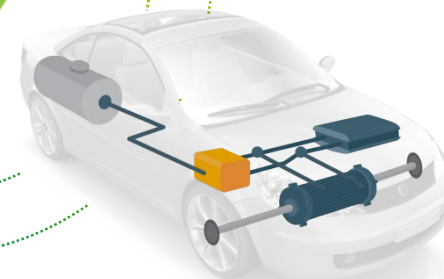
(p)HEV
Battery materials
and emission
control catalysts



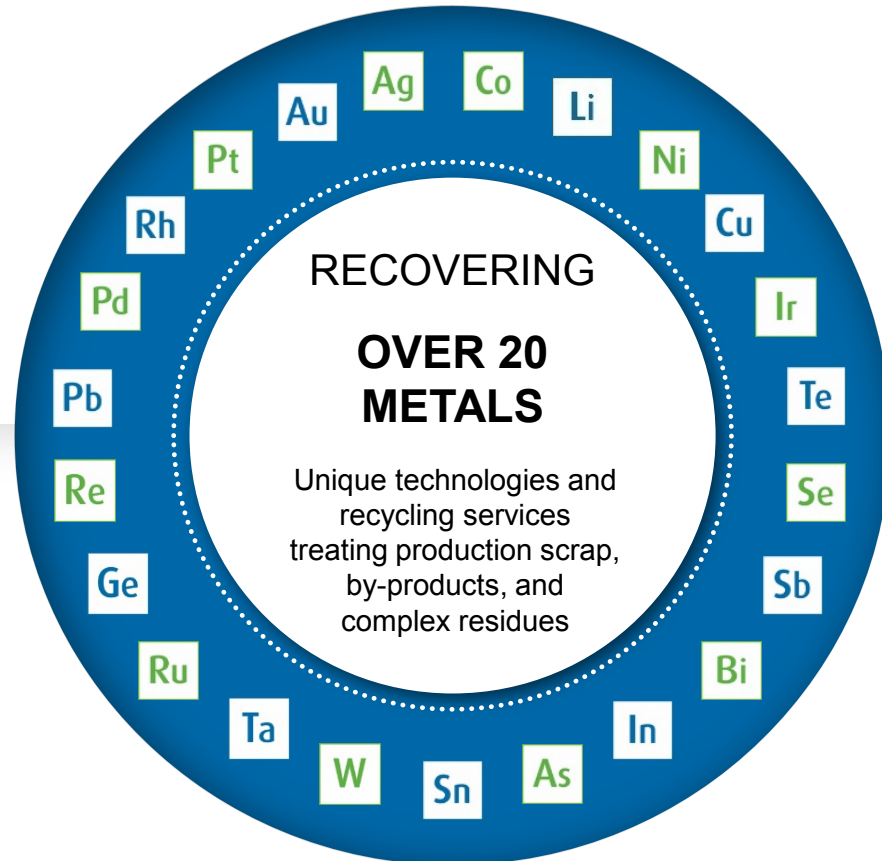
BEV
Battery materials



Fuel cells
Electro-catalyst and
battery materials



Unique position in recycling



Turning sustainability into a greater competitive edge






**We have transformed Umicore into
a sustainability leader over the past 15 years**

The purpose is to generate more concrete benefits
from our sustainability efforts eg:

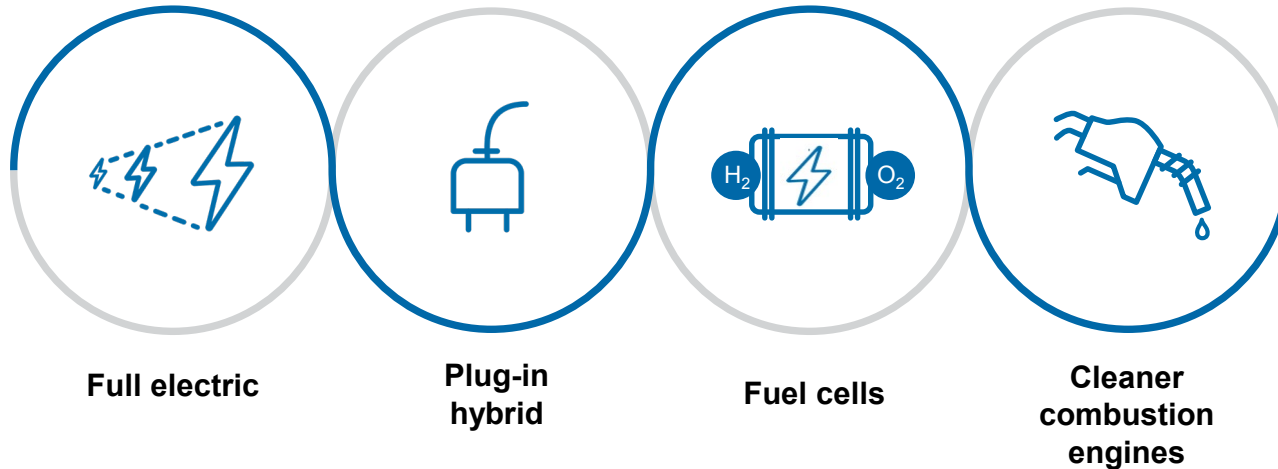


Delivering on our Horizon 2020 strategy

 <p>Clear leadership in clean mobility materials and recycling</p>	 <p>Doubled the size of the business in terms of earnings</p>
 <p>Rebalanced the portfolio & earnings contributions</p>	 <p>Turned sustainability into a greater competitive edge</p>

Preparing the ground for further growth

Clean Mobility innovation roadmap
spanning the next 20 years



Battery Recycling
gaining traction


Global presence:

 PEOPLE
10,420


 PRODUCTION SITES
48

 R&D | TECHNICAL CENTERS
14


North America

 **838**
people

 **11**
production sites

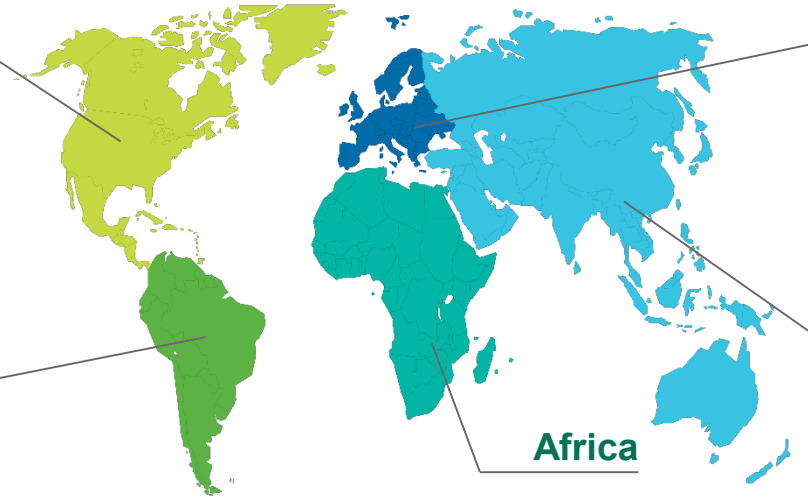
 **2**
R&D technical centers

South America

 **678**
people

 **5**
production sites

 **1**
R&D technical center





Africa


259
people 

1
production site 

Europe


5,723 
people


17 
production sites

5 
R&D technical centers

Asia / Pacific

2,922 
people

14 
production sites

6 
R&D technical centers

Key figures 2018

Revenues
€ 3.3 bn

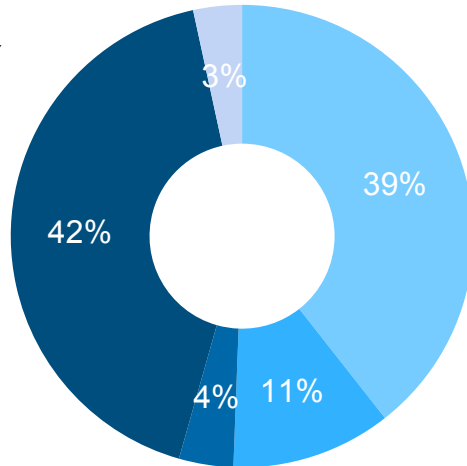
Recurring EBIT
€ 514 m

Recurring EPS
€ 1.36/share

R&D spend
€ 196 m

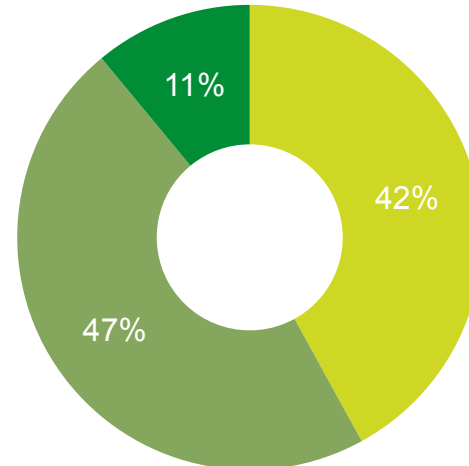
REVENUES BY GEOGRAPHY

- Europe
- North America
- South America
- Asia-Pacific
- Africa

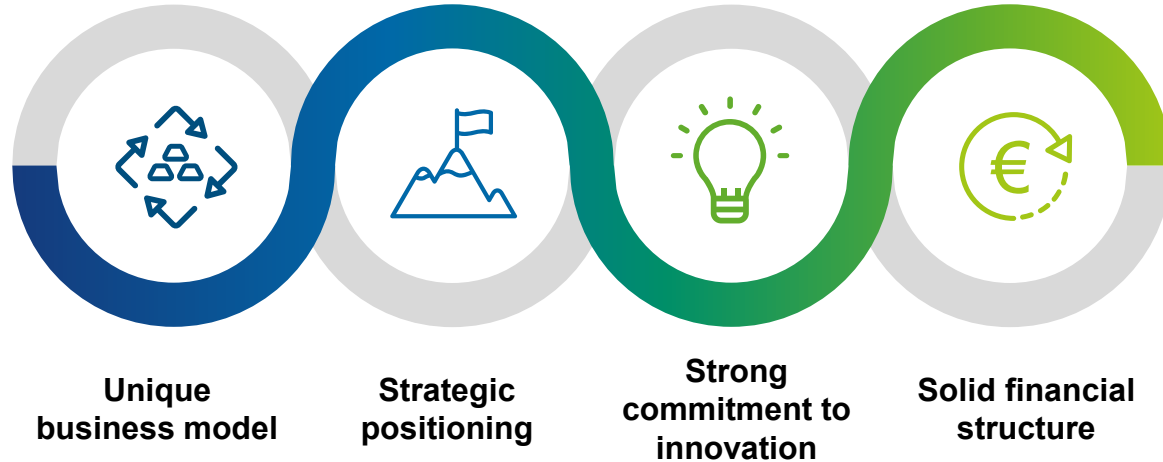


INPUT MATERIALS

- Primary materials
- Secondary materials
- End of life materials



Our strategic ambitions are supported by



Clear leadership in
clean mobility materials
and recycling

Turn sustainability
into a greater
competitive edge





Annexes

Our Group structure



CATALYSIS

Automotive Catalysts
Precious Metals Chemistry



ENERGY & SURFACE TECHNOLOGIES

Rechargeable Battery Materials
Cobalt & Specialty Materials
Electroplating
Electro-Optic Materials



RECYCLING

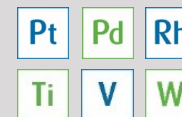
Precious Metals Refining
Precious Metals Management
Jewelry & Industrial Metals



Catalysis overview

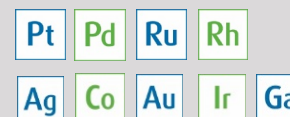
Automotive Catalysts

A world leader in emission control catalysts for light-duty and heavy-duty vehicles for all fuel types. Now also including non-road heavy-duty diesel catalysts and stationary catalysts for industrial plant emissions control.



Precious Metals Chemistry

Developer and producer of metal-based catalysts used in chemistry, life sciences and pharmaceutical applications.





Energy & Surface Technologies overview



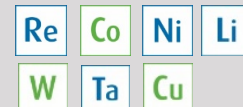
Rechargeable Battery Materials

A leading cathode material supplier for lithium-ion rechargeable batteries used in portable electronics and electrified vehicles.



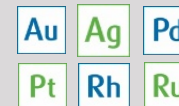
Cobalt & Specialty Materials

Producer of cobalt and nickel specialty chemicals for a wide range of applications, including tires, pigments, catalysts and surface treatment. Now also responsible for proprietary Li-ion rechargeable battery recycling technology.



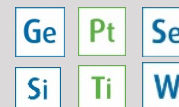
Electroplating

Supplier of precious metal electrolytes & processes for technical, functional and decorative applications.



Electro-Optic Materials

Supplier of products for thermal imaging as well as wafers for space solar cells and high brightness LEDs and chemicals for fiber optics. Now also producer of evaporation material and sputter targets for optics and microelectronics industry.





Recycling overview

Precious Metals Refining

Operator of the world's most sophisticated precious metals recycling facility able to recover 17 precious and other valuable metals from complex waste streams.

Ag	Te	Sb	Ir	Pt	Bi
Pb	Au	Sn	In	As	Ni
Se	Ru	Pd	Rh	Cu	

Precious Metals Management

Services for hedging, leasing, purchasing and sale of precious metals to internal and external customers.

Ag	Pt	Au	Ir
Ru	Pd	Rh	

Jewelry & Industrial Metals

Supplier of precious metals creating products for the jewelry and industrial sector and specialist in the manufacturing of platinum group metals components for the special glass and chemical industries, offering recycling solutions.

Ag	Au	Pt
Pd	Rh	

Giving back to society

Our commitment



Umicore supports projects and organizations with:

- A clear **educational component**
- An **international scope**
- A link to **sustainable development**
(social, environmental and/or technological)

Partnering for impact

unicef for every child

Long-term partnership with UNICEF

- Umicore supports two child-education projects in India and Madagascar.
- Our partnership translates into very concrete actions
 - Construction of schools
 - Improvement of education systems



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