

WE ARE SIKA

MARKETS



COMPANY



BUILDING TRUST



Sika is a specialty chemicals company with a leading position in the development and production of systems and products for bonding, sealing, damping, reinforcing, and protecting in the building sector and the motor vehicle industry.

Sika has subsidiaries in 89 countries around the world and manufactures in over 160 factories. Our 16,000+ employees generate annual sales in excess of CHF 5 billion.

SIKA AT A GLANCE

16,000+	TEAM MEMBERS
89	COUNTRIES
160+	FACTORIES WORLDWIDE
10	NEW FACTORIES IN 2013
73	NEW PATENTS IN 2013
5	ACQUISITIONS IN 2013
5.14 BN	NET SALES IN 2013

WHAT WE DO

BUILD TA

© Jeff Smith Photography



WE ARE THERE

Our products might not always be visible but the results they achieve are clear to see. From the new European Central Bank in Frankfurt all the way across the globe to the Waterview Connection Tunnel in New Zealand – Sika is making its mark on the world.



OUR STRATEGY

We work with a four year strategy to increase our market penetration through the development of innovative new products, acquisitions of complementary businesses and accelerated growth in emerging markets. This, coupled with our Sika Values, will help us to achieve a steady annual growth and increased sales in new areas.



JAN JENISCH,
CEO SIKA

"The commitment and competence of our employees, as well as our investments in growth markets, give us confidence in our future. Our new product launches and innovations will also fuel further success."

ING RUST



100 YEARS OF EXPERTISE

Our reputation for quality and reliability is virtually unmatched, and is illustrated through a comprehensive portfolio of problem solving products that have been employed for many years in a diverse range of applications.

Whether we are waterproofing your basement or your roof, sealing your skyscraper or your car, or working with you on your house or your multi-storey building, you will see why we are renowned for Building Trust.

WHAT MAKES US SUCCESSFUL

COURAGE

INNO

800

EMPLOYEES ARE
DEDICATED TO RESEARCH
AND DEVELOPMENT



Sika's success and reputation is based on our long-lasting tradition of innovation. Accordingly, the core of our business is the innovation management and the focus on developing quality products and the best solutions for customers. We have institutionalized a Product Creation Process with a strong focus on consistently developing new products, systems, and solutions for all of our markets.

We provide intelligent solutions using the most advanced technologies, service and unique expertise. In fact we are well known for our high quality construction and industry solutions, which always meet the latest independent tests, standards and regulations – giving our customers complete peace of mind and the reassurance of working with a quality manufacturer.

GLOBAL THINKING

Sika Technology AG in Switzerland takes the lead in long-term research programmes for the whole Sika Group whilst the responsibility for the development of new solutions sits with our 20 Global Technology Centers plus 18 Regional Technology Centers worldwide. New products and systems are also developed on a regional level to meet the local market's specific needs and requirements. This process helps us to facilitate cost-optimization for manufacturing and effective market pricing.

FOR OVATION



INNOVATION LAB

In the development of our products we focus on modern solutions like our i-Cure® technology, which has helped us develop an array of technologically advanced sealing and bonding products as well as paving the way for eco-efficient liquid roofing membranes that also offer maximum safety during installation. Or our innovative filler technologies that produce new high-performance mortar products with improved workability and a broader scope of application.



73

NEW PATENTS
WERE FILED
FOR IN 2013

MEETING HIGH EXPECTATIONS

All Sika solutions are designed with our customers' success in mind and we look to build long-lasting and mutually beneficial relationships rather than focus on short-term business. Our aim is to meet all of the challenges our customers face by launching new products in response to tighter regulations for adhesives and sealants, developing new solutions to meet the ever-greater demands in terms of trouble-free application and environmental compatibility in the flooring market, or catering for the requirement for lightweight constructions in the automotive industry.

2,378

NEW PATENTS
REGISTERED
SINCE 1910



ACCELERATED BUILD-UP OF GROWTH MARKETS

We have increased our investments in emerging markets, accelerating the build-up of our local supply chains. Over the last few years we opened more than 20 new factories in growth markets enabling us to strengthen our local presence and to better serve the local requirements. This continuously improves the close proximity to our customers - which is what distinguishes us in the market. We have a long tradition of entering new markets at an early stage, for example the first subsidiaries in Latin America were founded in the 1930s. This enables us to take part in the development of the market and to build up a solid position. We take a long-term view, placing great value on building long-lasting customer relationships.

MORE THAN

160

FACTORIES WORLDWIDE

EMERGING MARKETS

WORLD



LOCAL AND GLOBAL SOURCING

We source raw materials both locally and globally in order to find the best solutions for our products. Our aim is to work with local suppliers wherever possible, not only to reduce lead time and increase availability for our customers, but also to reduce risk and the environmental factors associated with transporting goods.

GLOBAL TECHNOLOGY MEETS LOCAL EXPERTISE

Throughout the world our construction business is local. We build up the technical expertise within our local organizations, training local employees and transferring know-how on a global basis. This means we can guarantee personal local support on all job sites, based on more than 100 years of global experience.



GROWING WORLDWIDE

We pursue a growth strategy with a particular focus on the accelerated expansion in emerging markets. These strongly growing markets are characterized by increasing urbanization and the development of megacities, which in turn leads to a rising demand for high-performance construction products that meet stringent safety, earthquake and fire resistance, and quality requirements. For example innovative waterproofing and roofing solutions, the functional sealing of building envelopes, or specialty high-strength concrete. In other words – just the kind of solutions, products, and technologies we specialize in.

89

COUNTRIES ON
ALL CONTINENTS:
SIKA'S WORLDWIDE
PRESENCE.

ACQUISITIONS

Our goal is to foster organic growth – which means we aim for growth fueled by innovative drive and entrepreneurial spirit. This organic growth is complemented by carefully targeted acquisitions which strengthen our market access and enhance our core business with related technologies. We pursue this policy as a means of steadily improving our market position and to take an active part in the consolidation of fragmented markets. We always strive to ensure a smooth integration – in particular we pay close attention to the local corporate culture and take care to accommodate the needs of our new team members.

MORE VALUE, LESS IMPACT

We are committed to pioneering sustainable solutions to address global challenges, and to achieve this safely at the lowest impact on resources. Creating and increasing value while reducing impacts – that is the goal.

Our strategy fully integrates sustainability into all of our business processes, and we strive to create value for our customers and partners along the whole supply chain and throughout the lifespan of our products. The value created far outweighs the impacts associated with production, distribution and use.



VALUES AND PRINCIPLES

OUR CORP

We take a long-term perspective on the development of our business and we act with respect and responsibility towards our customers, our stakeholders, and our employees.

The future success of our company is not only dependent on pursuing the right strategy, but is just as much based on the trust and dedication of all our employees.

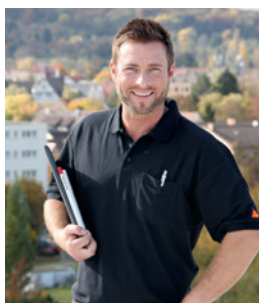


SIKA PEOPLE

We believe in the competence and the entrepreneurial spirit of our employees. Our team is the biggest asset we have and thanks to the dedicated people we employ we are able to provide high levels of customer and technical service. It is this high quality service alongside our product innovations that makes us Sika.

STEPHAN ENGELHARDT, APPLICATION ENGINEER ROOFING

"We consider our customers as team members to reach our common goal – durable, high-quality roofs."



MORE THAN

16,000

PEOPLE ARE EMPLOYED
BY SIKA WORLDWIDE.



ORATE CULTURE

BUILDING TRUST

We believe trust is the foundation of our partnerships and collaborations. For us it is demonstrated in the quality of our work and is the result of our innovative power and perseverance. However it is not a static state, but a continuous process that needs to be actively cultivated. The Sika brand exists because every day we continuously invest in building trust.

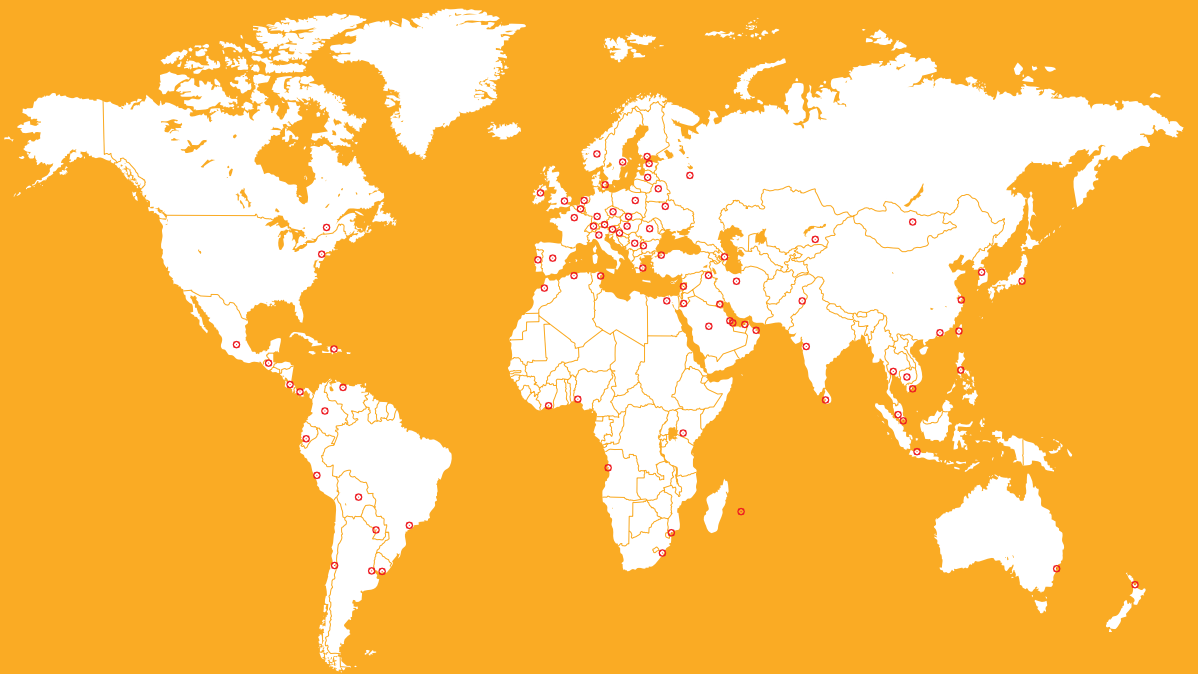


SIKA PRODUCTS – BUILDING TRUST

You might not see our products but chances are the building you are in has a Sika solution somewhere in its structure. Or perhaps the car you drive has been made safer, lighter and more efficient thanks to a Sika product. And maybe the energy you are using has been harnessed via a wind farm protected with Sika materials.

We operate in seven different markets – concrete, waterproofing, roofing, flooring, sealing & bonding, refurbishment, industry – in both the construction and motor vehicle industries, providing high quality products and solutions anywhere in the world.

WORLDWIDE MARKET PRESENCE



• SIKA SUBSIDIARIES



WHEN AN ENTIRE VALLEY CAN RELY
ON THE STRENGTH OF THE CONCRETE.

CONCRETE

Sika develops and markets numerous admixtures and additives for use in concrete, cement and mortar production. These products enhance specific properties of the fresh or hardened concrete, such as workability, watertightness, durability, or early and final strength.

The demand for admixtures and additives is currently on the rise, particularly due to the increased performance requirements placed on concrete and mortar, especially in urban areas and for infrastructure construction. Furthermore, the growing use of alternative cementitious materials in cement, mortar and thereby also in concrete, increases the need for admixtures.

INNOVATIONS

Extended workability, controlled over several hours, is especially important for urban construction sites with congested traffic, or remote areas resulting in long transportation times. At the same time, once the concrete is placed, fast curing is of utmost importance to meet tight construction schedules. **Sika ViscoFlow**® is a workability enhancing admixture, based on a new inhouse-developed polymer which significantly prolongs the workability time of the fresh concrete and still ensures equally fast strength development. The workability time can be modified in accordance with differing distances to job sites. Furthermore, the required consistency of the concrete is ensured in high as well as in low temperature climates.

TOP BRANDS IN CONCRETE

Sika® ViscoCrete®
Sikament®
Sika® Plastiment®
Sikaplast®
Sika® Plastocrete®
Sika® Sigunit®
SikaGrind®
Sika ViscoFlow®
SikaPaver®
SikaRapid®

MAIN APPLICATION AREAS

Ready mix concrete companies
Infrastructure projects
Precast element manufacturers
Dry mortar plants
Cement industry
Gypsum board production

Detailed information and references:

www.sika.com/concrete



**WHEN TUNNELS STAY
WATERTIGHT FOR GOOD.**

WATERPROOFING

Sika's solutions cover the full range of technologies used for below-ground waterproofing: flexible membrane systems, liquid applied membranes, waterproofing admixtures for mortars, joint sealants, waterproofing mortars, injection grouts and coatings.

Key market segments include basements, underground parking garages, tunnels and all types of water-retaining structures (for example reservoirs, storage basins, storage tanks). Watertight systems are faced with more stringent requirements regarding sustainability, easy application and total cost management. Therefore the selection of appropriate waterproofing systems according to the needs and requirements of the owner as well as the detailing of the solution are key for long-lasting and watertight structures.

INNOVATIONS

One of the most recently launched solutions is the innovative **SikaProof®** below ground waterproofing system. This fully bonded system consists of a highly flexible polyolefin membrane with a unique grid pattern of sealant and a specially designed non-woven fleece. The full mechanical bond effect emerges when the fleece is completely embedded in the fresh concrete. In addition, the sealant grid prevents any lateral water underflow between the membrane and the concrete as the grid-pattern creates small watertight compartments. The highly durable SikaProof® system is fast and secure to install which results in long-lasting, cost efficient waterproofing.

TOP BRANDS IN WATERPROOFING

Sikaplan®
SikaProof®
Sikadur-Combiflex®
Sika Waterbar®
Sika® Injection
SikaTop®
Sika®-1
SikaFuko®
SikaSwell®

MAIN APPLICATION AREAS

Basements
Tunnels
Bridges
Water and wastewater tanks
Pits and ponds
Dams and hydraulic structures

Detailed information and references:

www.sika.com/waterproofing



WHEN ROOFING SYSTEMS MAKE
NEW WAYS OF LIVING POSSIBLE.

ROOFING

Sika provides a full range of single-ply and built-up flat roofing systems incorporating both flexible sheet and liquid applied membranes. Demand in this segment is driven by the need for eco-friendly, energy-saving solutions such as green roof systems, cool roofs and solar roofs, which simultaneously help to reduce CO₂ emissions.

While refurbishment projects continue to gain significance in the mature markets, the emerging markets are moving towards higher quality roof solutions.

INNOVATIONS

Two new liquid applied membrane systems have been launched onto the market. **Sikalastic® 641** is a low-odor product with significantly reduced solvent and VOC content. It is based on the patented i-Cure® hardener technology and has been developed specifically for use in highly sensitive areas, such as hospitals, food manufacturing plants and schools. **Sikalastic® Everguard® Zero-1** is a one-component polyurethane system which has successfully been introduced to the Asian market. Since no mixing is required, the application, and consequently construction time, is shortened. Sika has also developed an online **specification tool** which helps customers choose the right products for their projects. Not only does the tool help to identify the most appropriate system, it will also conduct a life-cycle cost analysis which can be used to compare against other products.

TOP BRANDS IN ROOFING

Sarnafil®
Sikaplan®
Sikalastic®
SikaFill®
Sarnacol®
Sarnatherm®
Sarnamatic®
Sikatherm®

MAIN APPLICATION AREAS

Exposed roofs
(mechanically fixed or adhered)
Liquid applied membranes
(sprayed or hand applied)
Gravel ballasted roofs
Utility roof decks
Green roof systems
Cool roofs with highly reflective
membranes or coatings
Solar roofs
Special roof design
(color, shape, decor)

Detailed information and references:

www.sika.com/roofing



**WHEN FLOORS PERFORM AS
EFFECTIVELY AS THE STAFF.**

FLOORING

Sika's flooring solutions are based on synthetic resin and cementitious systems for industrial and commercial buildings, for example pharmaceutical and food-sector production plants, public buildings such as educational and health care facilities, parking decks and private residential properties.

Each market segment is subject to its own particular requirements in terms of mechanical properties, safety regulations (for example slip resistance), antistatic performance, and chemical or fire resistance. Trends in the flooring market are being dictated by the growing significance of safety and environmental regulations as well as customized technical requirements. The high volume of building alteration and conversion projects nowadays has boosted the importance of efficient solutions for the refurbishment of existing flooring systems.

INNOVATIONS

The one shot parking deck system with **Sikalastic®-8800** and **Sikafloor®-359** is a new fast-applied flooring system. By using a new injection process, the spray application of the waterproofing layer and the wearing course can be done at the same time. Two working steps are combined in one shot. This means that the entire application of a 1,000 m² parking deck can be completed in one day. Accordingly the down-time for the parking garage is significantly reduced. The new injection process also leads to material savings, as up to 75% less aggregates are used.

TOP BRANDS IN FLOORING

Sikafloor®
Sikalastic®
Sika® Level
Sika® Permacor®
Sika® Unitherm®
SikaCor®

MAIN APPLICATION AREAS

Car park floors
Production, process, logistic
and storage facilities
Cleanroom floors
Floor areas with electrostatic
discharge protection
Fire / corrosion protection
for steel structures
Commercial, public and
residential floors
Walls and ceilings
Tank linings and water
treatment facilities

Detailed information and references:

www.sika.com/flooring



**WHEN JOINTS CAN HANDLE
ANY AMOUNT OF WATER.**

SEALING & BONDING

Sika's wide-ranging portfolio includes top-class elastic sealing and bonding solutions to meet all job site needs, for example joint sealants for facades or resistant sealants for floor and special joints as well as multipurpose bonding solutions for interior finishing or parquet and soft floor covering installations.

The growing demand in this market is fueled by the sharper focus on energy-efficient building envelopes, the ever greater variety of materials used in construction, the increasing volume of high-rise projects and the growing significance of health, safety and environmental issues.

INNOVATIONS

Sika launched the new **SikaHyflex**[®] family of high-performance sealants for the building envelope, which meet the strictest technical requirements and help to build sustainable and energy efficient buildings. Due to the growing significance of health and safety Sika, as market and technology leader for polyurethane sealants and adhesives, developed the new **i-Cure**[®] **hardener technology** which combines the best properties of traditional polyurethane sealant and adhesive technology with features such as very low emissions, solvent free and classification free. Easy and safe application as well as high initial tack with a wide range of application possibilities are the key benefits of the newly launched **Sika high tack adhesives** for elastic multipurpose bonding, which can replace conventional fixing methods such as nails and screws.

TOP BRANDS IN SEALING & BONDING

Sikaflex[®]
SikaBond[®]
SikaHyflex[®]
Sikasil[®]
Sika MaxTack[®]
Sikacryl[®]
Sika Boom[®]
Sika[®] MultiSeal

MAIN APPLICATION AREAS

Building envelope solutions
Civil engineering and floor joints
Floor covering solutions
Interior finishing
Universal bonding

Detailed information and references:
www.sika.com/sealing-and-bonding



WHEN THOUSANDS OF PEOPLE CAN
TRUST RELIABLE MAINTENANCE.

REFURBISHMENT

This segment features concrete protection and repair solutions, for example repair mortars, protective coatings, grouts and structural strengthening systems. It also includes products for interior finishing, such as leveling compounds, tile adhesives and tile grouts.

Sika provides technologies for the entire life cycle of commercial buildings, residential properties and infrastructure constructions. Especially in developed markets, many structures are decades old and need to be refurbished. The present uptrend in demand is attributable to a rising volume of infrastructure rehabilitation projects in the transport, water management and energy sectors. The global urbanization trend and the increasing need for renovation in developed countries also fuel demand in the interior refurbishment sector.

INNOVATIONS

SikaGrout®-334 and **SikaGrout®-234** are examples of the Sika ready-to-use mortar range specially formulated to reduce greenhouse gas emissions by replacing a significant part of the Portland Cement content with supplementary recycled waste materials - contributing to climate protection and improving resource efficiency, without compromising on performance. The new low-emission tile adhesive **SikaCeram®-290 StarLight** also contains sustainable raw materials. SikaCeram®-290 StarLight is a lightweight tile adhesive which covers 80% additional surface in comparison with a traditional tile adhesive.

TOP BRANDS IN REFURBISHMENT

Sikadur®
SikaGrout®
Sikagard®
Sika MonoTop®
Sika Top®
SikaCeram®
Sika AnchorFix®
SikaRep®
Sika® CarboDur®
Sika® FerroGard®

MAIN APPLICATION AREAS

Concrete repair
Concrete protection
Hydrophobic impregnation
Structural bonding
Structural strengthening
Grouting
Anchoring
Tile adhesives & grouts

Detailed information and references:

www.sika.com/refurbishment



**WHEN ADHESIVES MAKE
CARS LIGHTER AND SAFER.**

INDUSTRY

The markets served by Sika include automobile construction, the commercial vehicle industry (structural bonding, direct glazing, acoustic systems, reinforcing systems), automotive aftermarket (auto glass replacement, car body repair), renewable energies (solar and wind), and facade engineering (structural glazing, sealing of insulating glass units).

Sika technologies enable crash-resistant bonding for enhanced car safety. The new solutions for bonding together different materials, for example aluminum and carbon fiber, pave the way for lighter, more fuel-efficient vehicles. Manufacturers are also seeking solutions that minimize production time and costs.

INNOVATIONS

Examples of successfully introduced products which enable lightweight construction and enhance the vehicle's crash performance and resistance are **SikaPower**[®], an adhesive for the latest generation of high-strength, weight-optimized car bodies, and **SikaReinforcer**[®]-940 / -960 bonded reinforcing elements. For auto glass replacement, the new **SikaTack**[®] Zero offers the fastest "safe drive-away time" in the market. **Sikaflex**[®] 268 is a new product used for flush glazing - bonding of glass components without a protruding frame structure - in the rail industry. It allows bonding and backfill sealing with one product and offers the best weathering and thermal properties.

TOP BRANDS IN INDUSTRY

Sikaflex[®]
SikaBaffle[®]
SikaTack[®]
SikaPower[®]
SikaForce[®]
SikaReinforcer[®]
SikaMelt[®]
SikaSeal[®]
SikaDamp[®]
Sikasil[®]
SikaBlock[®]

MAIN APPLICATION AREAS

Automotive OEM and OES
Automotive aftermarket
Commercial vehicle industry
**Facade and fenestration
manufacture**
**Appliances and industrial
components**
Sandwich panels
Renewable energy industry
Tooling & composites
Marine industry

Detailed information and references:
www.sika.com/industry

BUILDING TRUST SINCE 1910

SIKA PROVIDES WATERPROOFING SOLUTIONS FOR MORE THAN

100 YEARS

THE FIRST PRODUCT - SIKA®-1 - IS STILL ON THE MARKET

EVERY YEAR SIKA SUPPLIES ENOUGH ROOF MEMBRANES TO COVER THE

WHOLE OF MANHATTAN

MORE THAN

30%

INTERIOR NOISE REDUCTION IN VEHICLES THANKS TO SIKA'S ACOUSTIC SOLUTIONS

USING SIKA'S LONG-LASTING WINDOW INSTALLATION SEALANTS, MORE THAN

1 MILLION

WINDOW FRAMES ARE SEALED EACH YEAR HELPING TO SAVE MORE THAN

10,000

TANKER LOADS OF HEATING OIL OVER THEIR COMPLETE LIFETIME

SIKA'S CLEANROOM FLOORING SYSTEMS RELEASE

1,000 TIMES LESS EMISSIONS

THAN STANDARD LOW VOC SYSTEMS

WITH

84 AWARDS

IN 16 YEARS, SIKA IS THE COMPANY WITH THE MOST CONCRETE REPAIR PROJECTS AWARDED WORLDWIDE

THANKS TO SIKA'S RANGE OF WATER REDUCERS OVER

25,000 MILLION LITERS OF WATER

ARE SAVED ANNUALLY IN CONCRETE PRODUCTION

IN OVER 80 COUNTRIES, MORE THAN

10,000 ROOFING CONTRACTORS

ARE TRAINED AND CERTIFIED BY SIKA

50 %

OF ALL CARS PRODUCED WORLDWIDE USE SIKA PRODUCTS