

Georg Fischer Ltd

Welcome Capital Market Day 2019

Andreas Müller, CEO

+GF+

Agenda



10:00	Welcome and introduction	Andreas Müller, CEO
10:15	Sustainability – a part of what we do	Mads Joergensen, CFO
10:30	Connected innovations making flow sustainable	Joost Geginat, Head of GF Piping Systems
10:50	Solutions for the future of mobility	Carlos Vasto, Head of GF Casting Solutions
11:10	Digitalization and the rise of intelligent manufacturing	Pascal Boillat, Head of GF Machining Solutions
11:30	Coffee break	
12:00	Show Cases	Various Moderators
13:30	Questions & Answers	All
14:00	Lunch	
14:30	Biel Plant / Visit of Innovation Centre	All
15:30	End	

New Innovation Center – Milling Manufacturing



The beginning ...



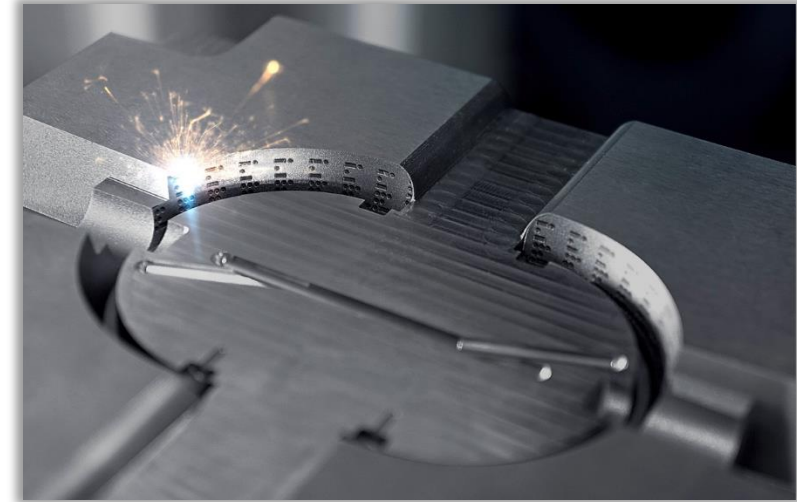
... completed



Cool Fit



E-Mobility



Laser Applications

Innovations for tomorrow

Contributing to everyone's life



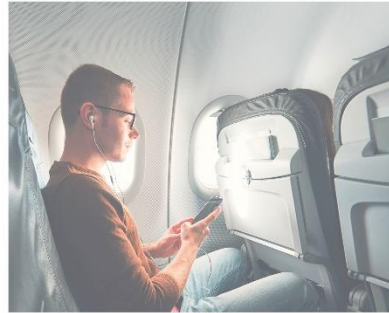
6 am



7 am



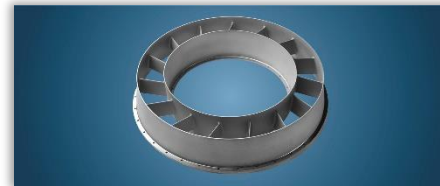
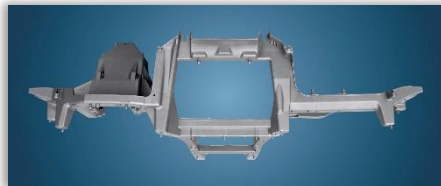
9 am



2 pm

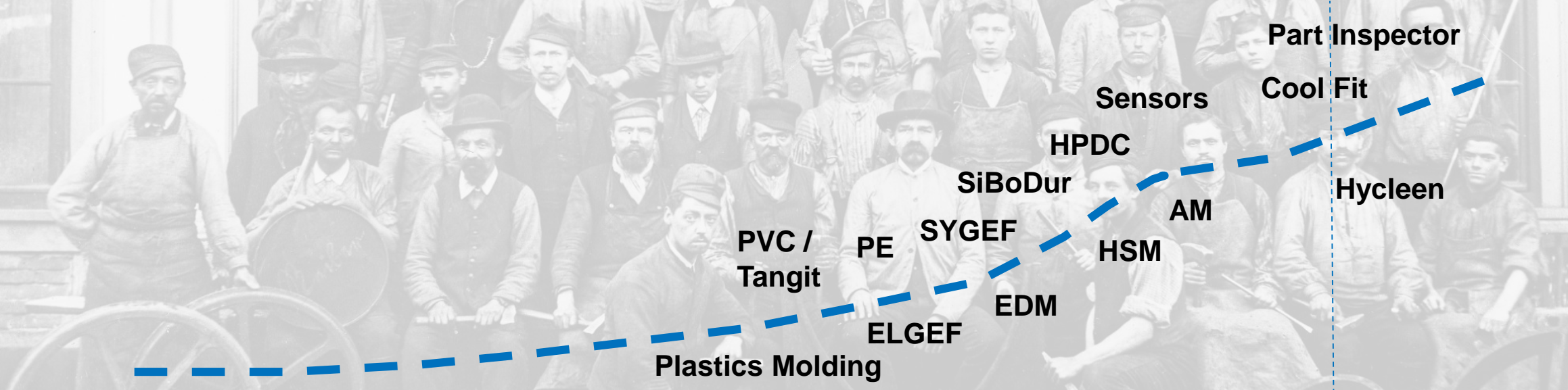


8 pm



Innovation – a value driver for >200 years ...

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Georg Fischer
founded in
Schaffhausen



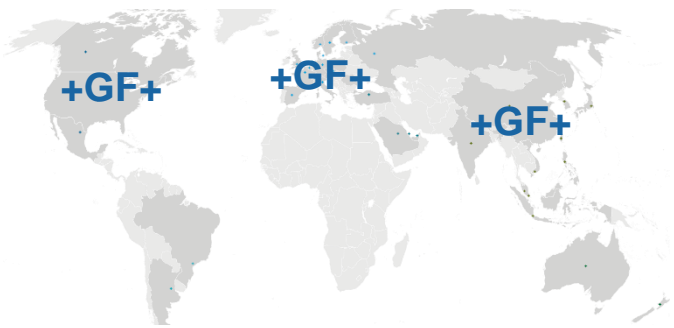
1802

today

... remaining a key pillar of our strategy



Widen presence in growth markets, adapt portfolio & footprint in Europe

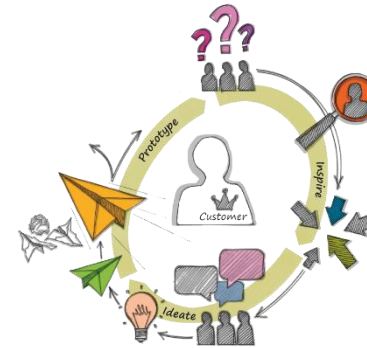


Shift divisions' portfolio to **higher margin businesses**



Drive **innovation excellence** and **sales proficiency**

Design Thinking
Customer-centered innovation

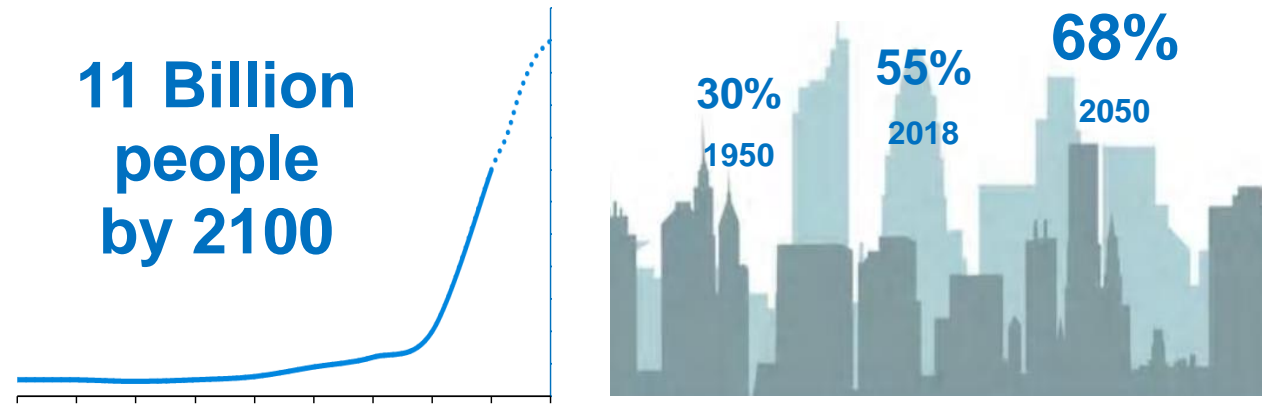


Understand customers
Quick prototypes
Agile implementation

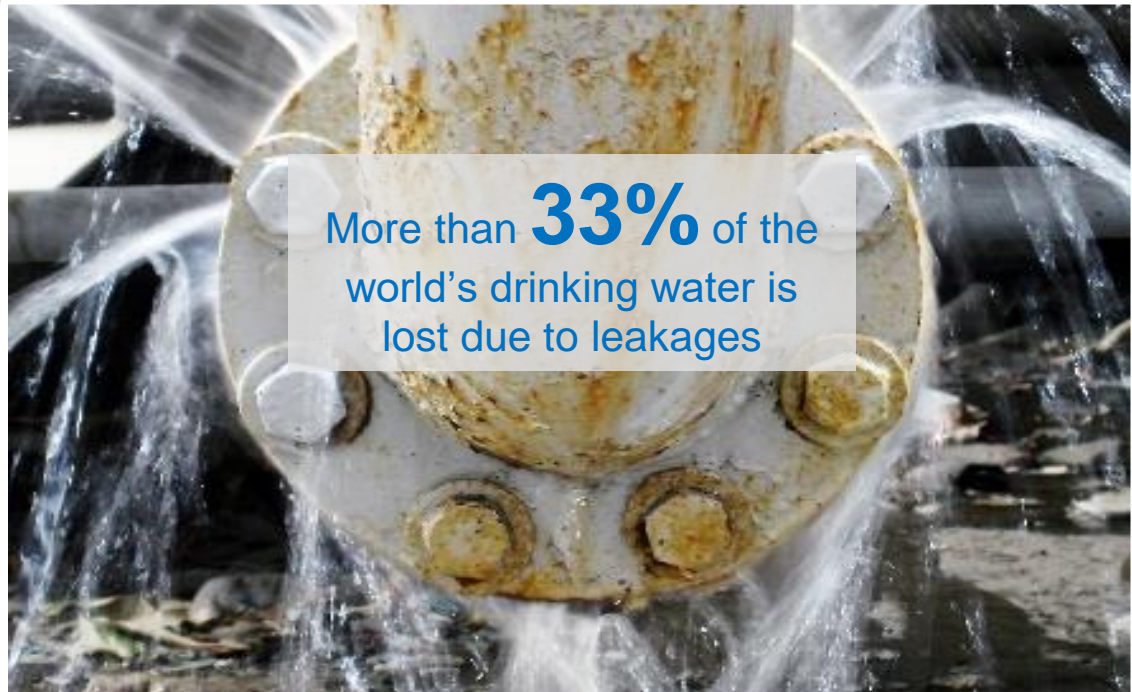
Objectives

- ROIC 20-24%**
- ROS 9-10%**
- Annual Growth 3-5%**

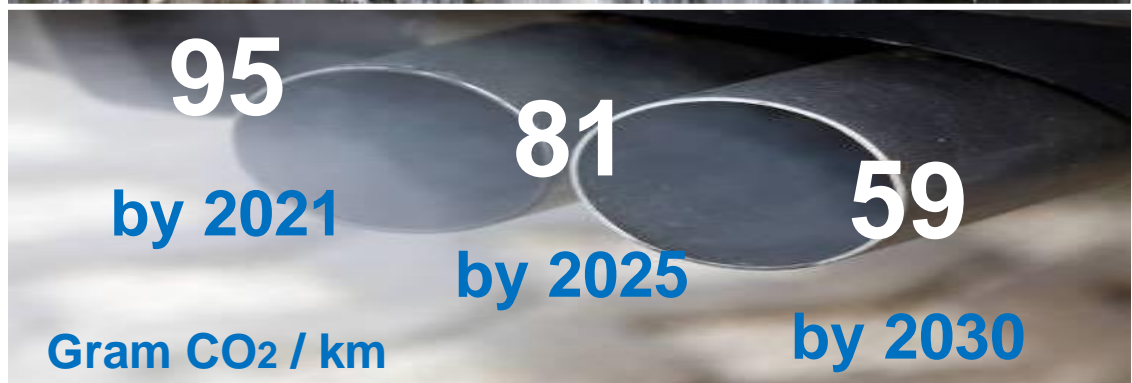
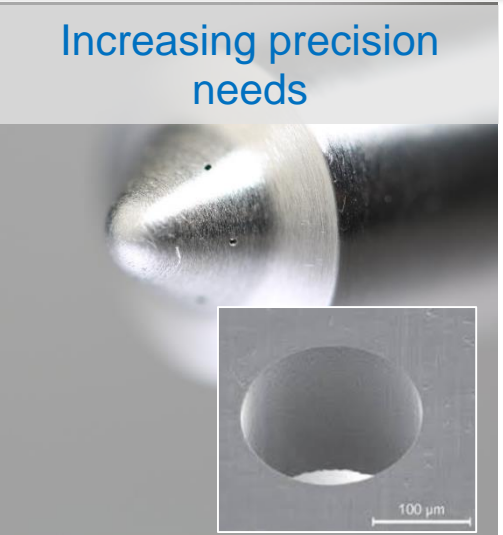
Growing & aging population and urbanization



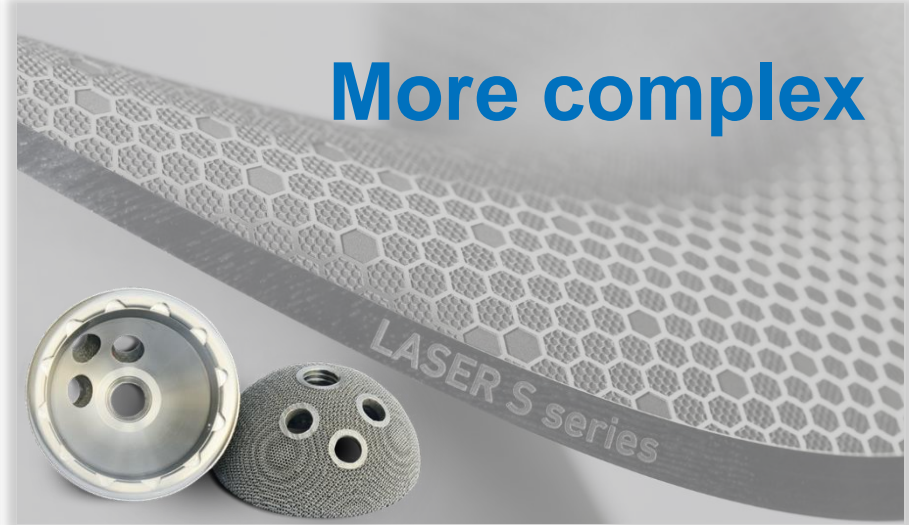
Increasing environmental relevance



Digitalization and miniaturization



... offer opportunities in our segments



... paired with customer collaboration ...

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... leads to digitally enhanced innovations



Track & Trace



Operational Excellence



Machines Dashboard

Our show cases – solutions for tomorrow



Hyclean Automation and Digital Line



Printed aero engine parts
Lightweight magnesium parts



Real time monitoring solutions in
EDM and Milling



An initiative of
GF Piping Systems

An initiative of
GF Piping Systems

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GF Piping Systems

Sustainability – a part of what we do

Mads Joergensen, CFO

Sustainability is integrated in our strategy and part of our culture



Safe & hygienic transport of water

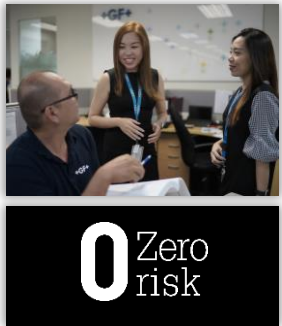
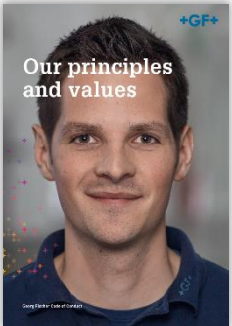
Reduction of CO₂ - emission through lightweight design & materials

Energy-efficiency through state-of-the-art machines



based on...

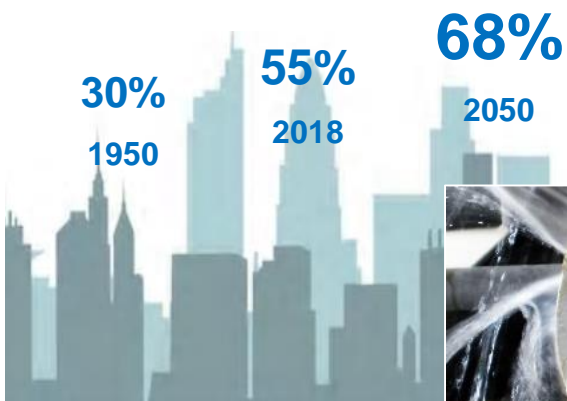
- Ethical business conduct
- Being a responsible employer
- Care for environment



Urbanization drives need for piping systems



Urban infrastructure needs



More than **33%** of the world's drinking water is lost due to leakages

\$14B annual revenue lost

Substantial water loss reduction in Brazil



Replacement of **760 km** of networks

Reduction of water loss by **-17%**

Annual savings of **75 billion liters** of water p.a.

Equivalent to ~ **8%** of the annual water consumption in Switzerland

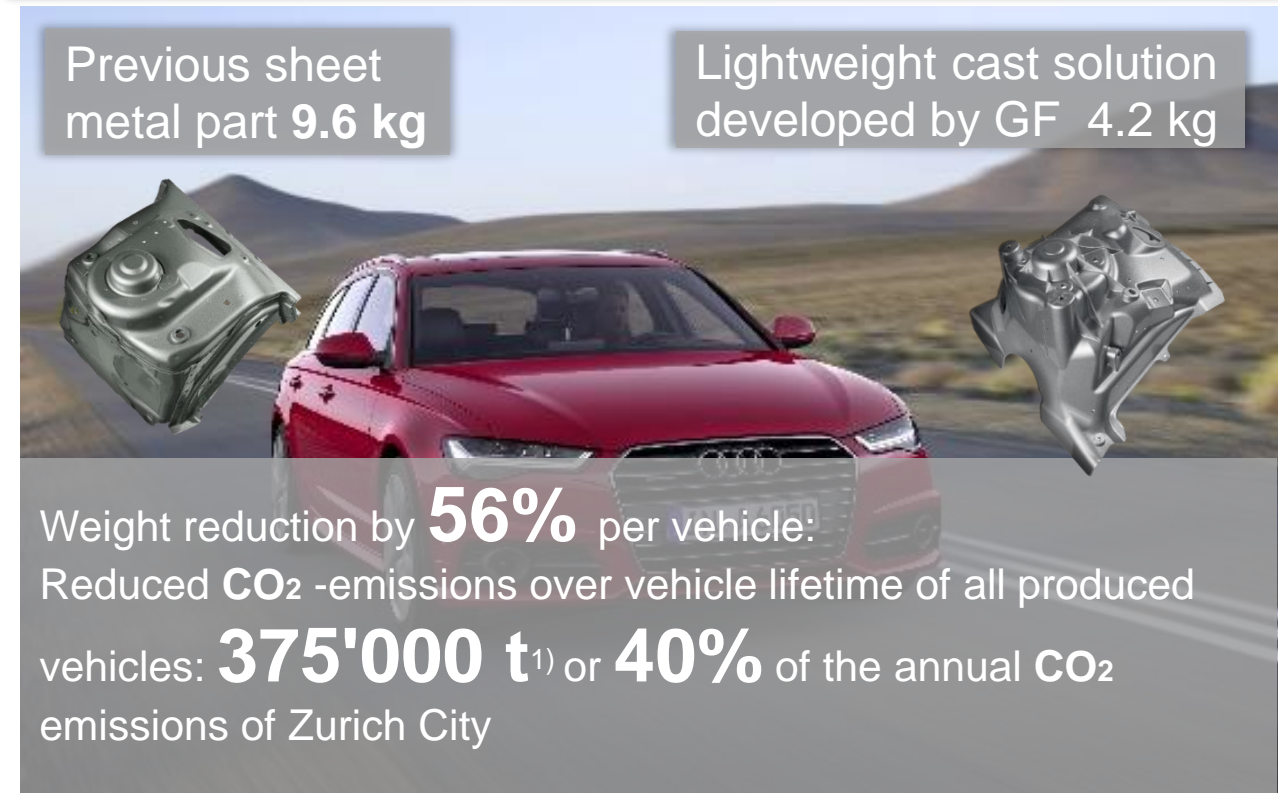
Increased environmental regulations drive demand for lighter components



CO₂-regulations EU



Significant CO₂ reduction



¹⁾ Audi A6. GF assumptions: 150'000 km lifetime over 8 years and 250'000 cars p.a.

Cost focus and eco regulations drive demand for micro-machined turbine components

Demand for efficient turbines

NOx

Noise

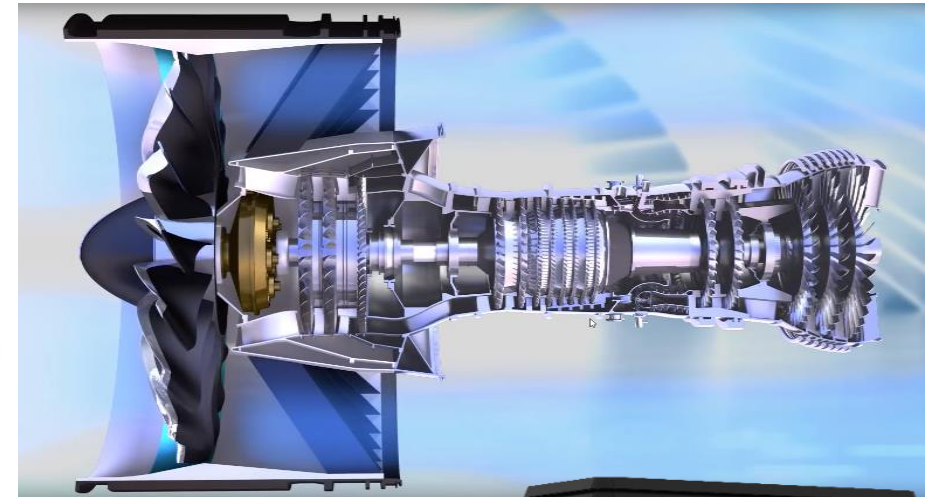
Efficiency



More than 30% efficiency increase

Ventilation
micro-holes
improve
performance
and efficiency

CMC



CMC is **2/3 lighter** with **20%** higher
temperature resistance



Sustainability investments in production facilities world-wide ...



On site collection of **filter dust** – provided at GF site in Traisen (Austria) to the nearby cement plant for **co-processing**



Silver certification under the **LEED** 2009 rating system for GF Linamar site in Mills River (USA).



Energy-efficient technology and use of **ambient air** as methods **for cooling** at production plants in Schaffhausen and Biel

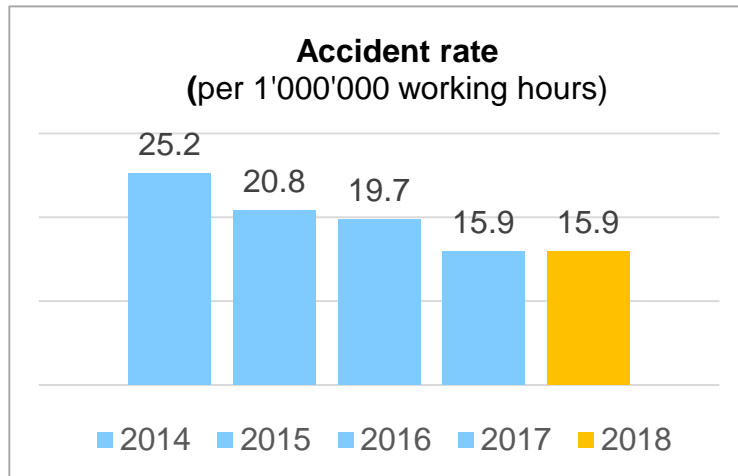


Biel building with **minergy** standard and **heat recuperation**

... and in our people - social responsibility is at the heart of GF

Safety first!

- **Occupational Health and Safety** carries the highest priority at GF
- Zero Risk campaign and accompanying monitoring measures contributed to decline in work-related accidents:
 - in 2018, the accident rate reduced by 33% from the baseline (avg. of 2013-2015)



Employer attractiveness

Efforts to enable flexible working models and **support employees in balancing family & work**

Continuous work on **modernizing** the production and working facilities to **create ergonomic and collaborative spaces**



Among the first to report on sustainability ...



2005



2006



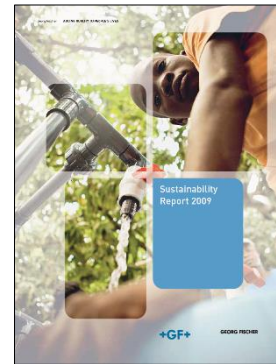
2007



2008



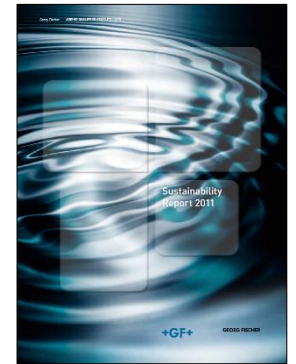
2009



2010



2011



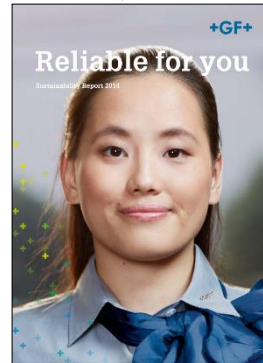
2012



2013



2014



2015



2016



2017



2018



Thank you!



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