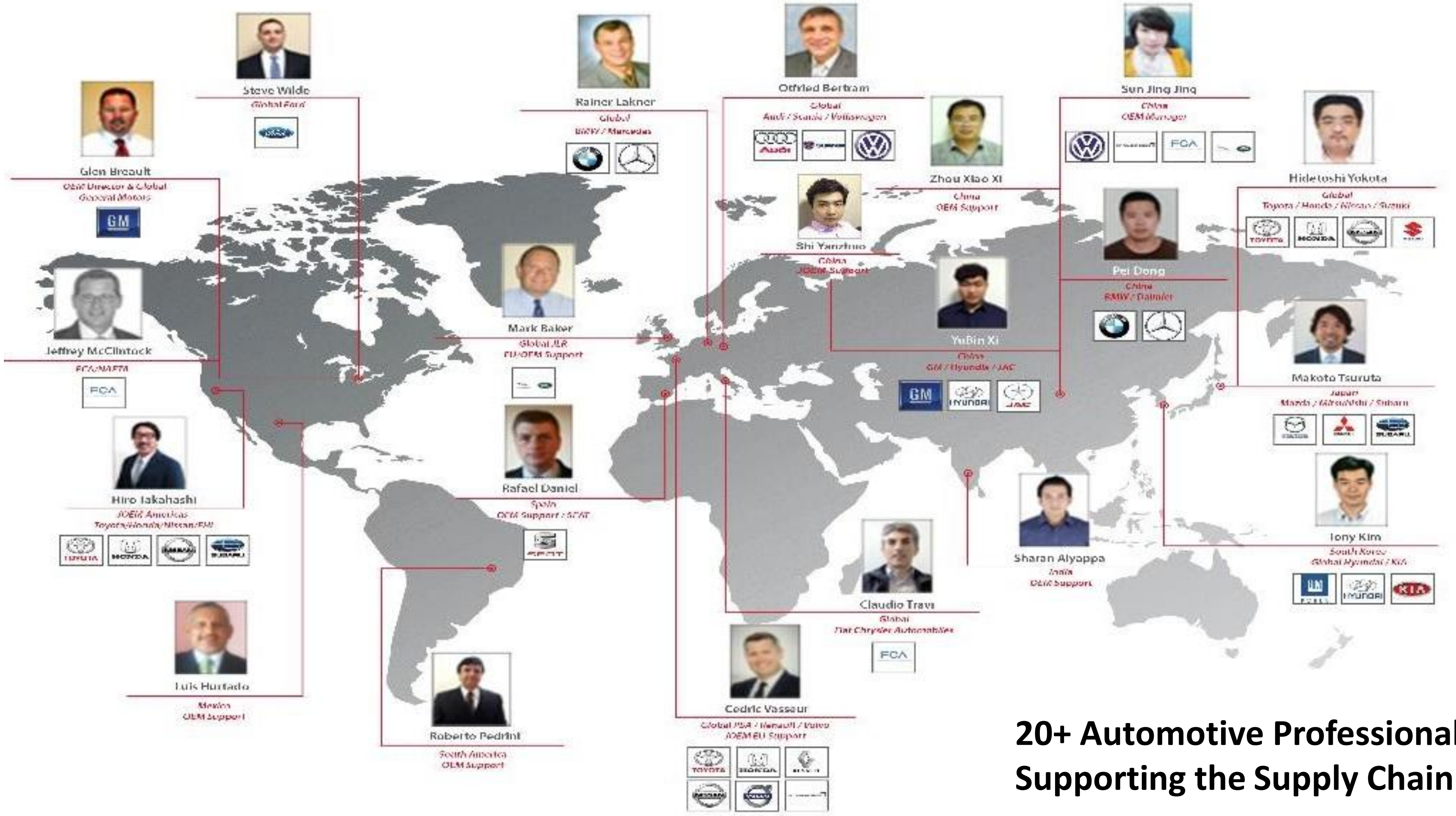
GLOBAL OEM UPDATE

2017 CASF Conference
Toronto, Ontario, Canada
November 15, 2017

Dave Gasparovich – Business Development Manager

Global OEM Coverage



20+ Automotive Professionals Supporting the Supply Chain

MacDermid
PERFORMANCE SOLUTIONS

Automotive Solutions

Industrial Solutions

- Braking Systems
- Decorative Trim
- Fasteners
- Powertrain & Chassis
- Suspension Systems
- Wheels

Electronics Solutions

- Electronics
- Flexible Circuits
- Printed Circuit Boards

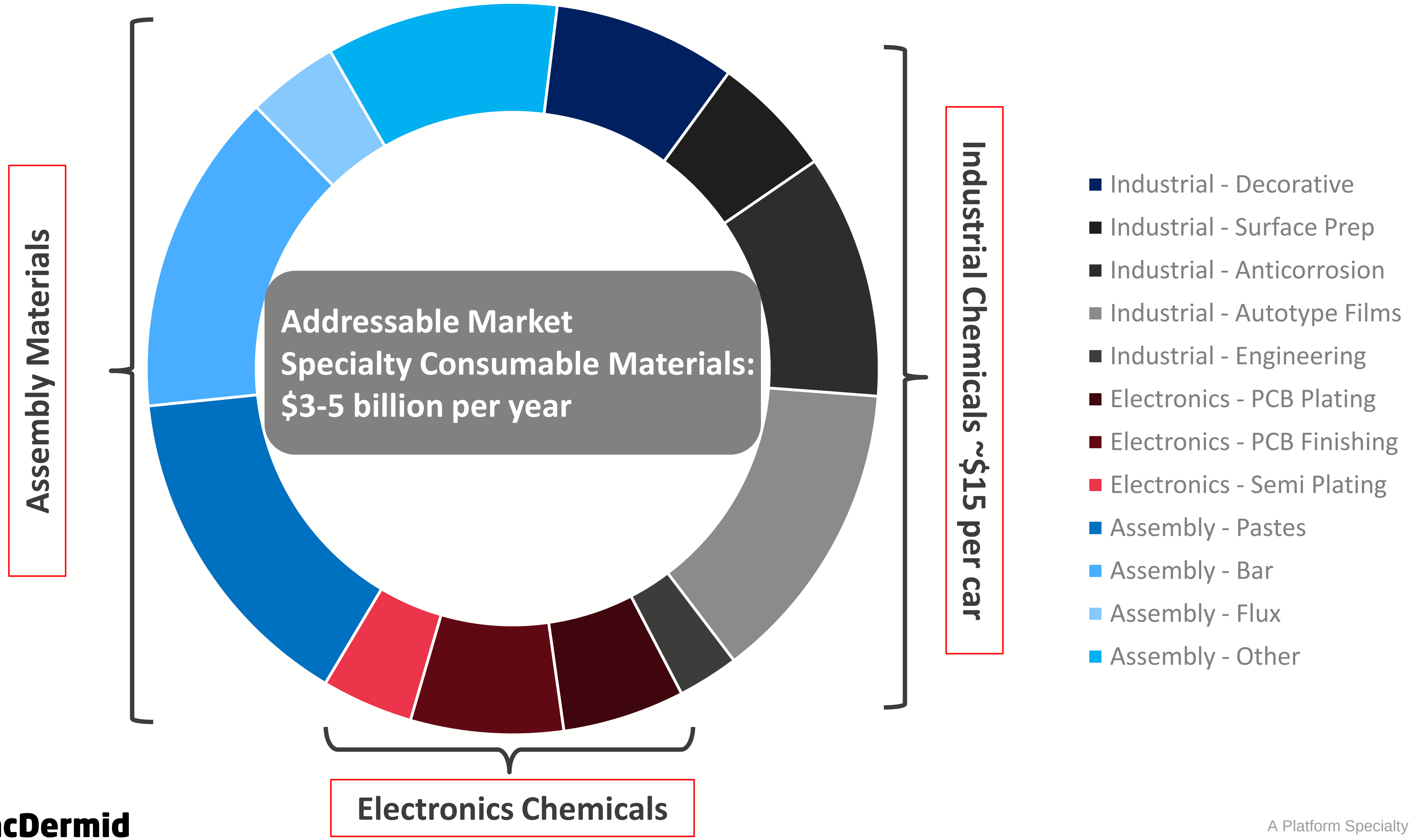
Film Insert Molding

- FIM – Cockpit Systems
- FIM – Displays
- FIM – Driver Interior
- FIM – High Wear Interfaces
- FIM – Anti-glare/Gloss/textures

Electronics Assembly Solutions

- Assembly Materials
- Engine Management
- Interior Controls
- Infotainment Systems
- LED Lighting

Target Rich: High-end Automotive



MacDermid PERFORMANCE SOLUTIONS

MEIS Pursues 81.5M of Global Volume

AutoForecast Solutions LLC

* Note ASIA-PACIFIC is: Australia, China, India, Indonesia, Japan, Malaysia, Myanmar, Pakistan, Philippines, Sri Lanka, S Korea, Taiwan, Thailand and Vietnam; MIDDLE EAST/AFRICA is: Algeria, Angola, Ethiopia, Iran, Keny

Global LV Production -

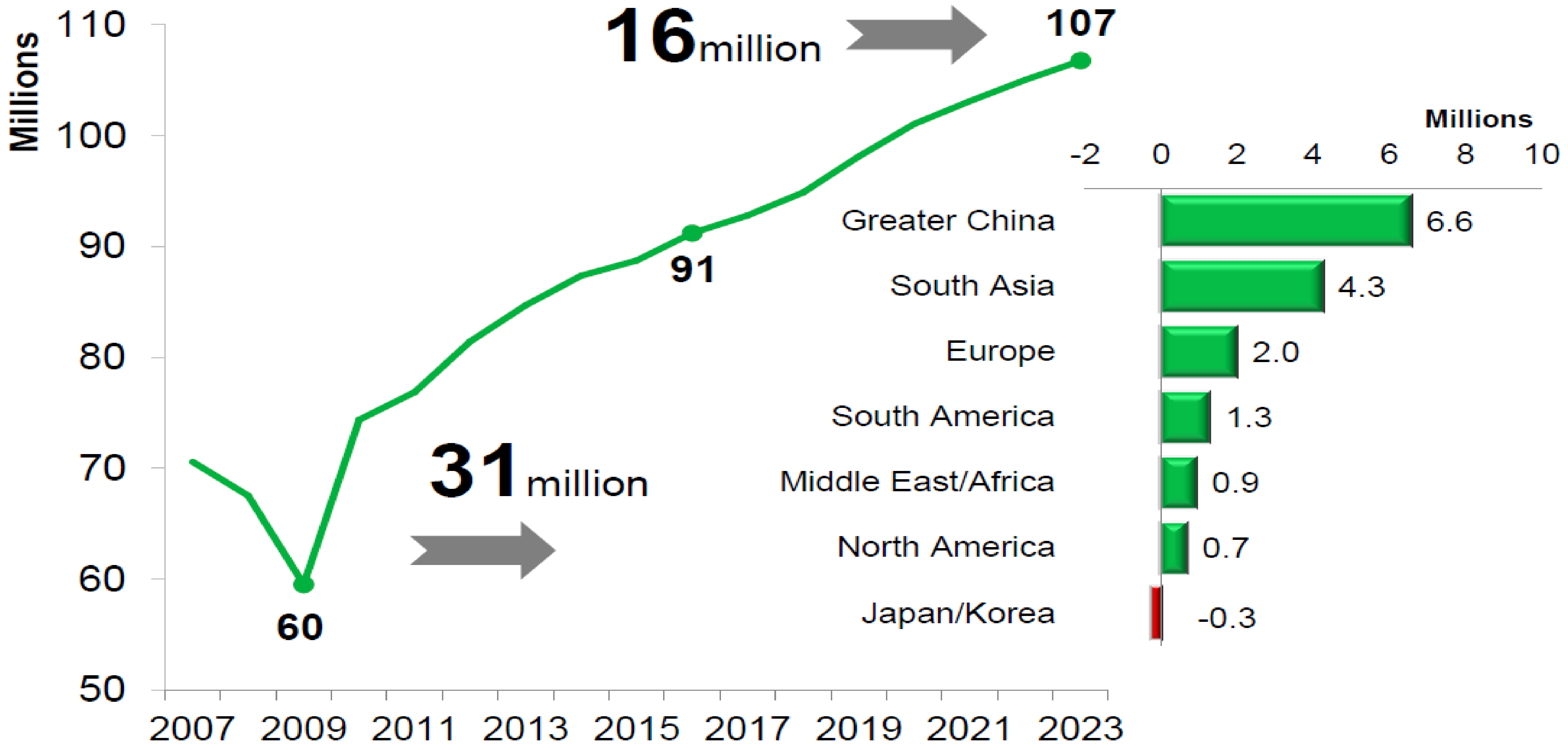
BrandOwner allocation, History and Forecast R1608

BrandOwner	Region	CY2016	CY2017	CY2018	CY2019	CY2020	CY2021	CY2022	CY2023
Total		92,530,000	95,140,000	97,765,003	100,000,663	102,141,046	103,481,084	104,470,472	105,392,736
Volkswagen	Total for group 10.2M	10,232,247	10,083,482	10,496,637	10,705,674	10,848,568	10,973,732	11,099,171	11,209,464
Toyota Motor	Total for group 10.0M	10,028,346	10,226,441	10,410,562	10,520,360	10,923,161	10,946,827	11,002,734	11,002,509
Renault/Nissan	Total for group 9.0M	9,004,450	9,136,375	9,132,677	9,326,100	9,575,077	9,850,258	10,030,756	10,047,314
General Motors	Total for group 10.07M	8,001,616	8,187,419	8,193,123	8,359,080	8,446,427	8,314,120	8,427,181	8,401,965
Hyundai Motor	Total for group 8.0M	7,944,456	8,216,362	8,879,899	9,182,397	9,421,163	9,603,230	9,661,106	9,815,586
Ford Motor	Total for group 6.7M	6,601,239	6,572,330	6,626,356	6,616,399	6,850,922	7,022,527	6,997,831	7,040,380
FCA	Total for group 4.9M	4,846,925	4,856,663	4,960,848	4,878,122	4,770,430	4,887,796	4,934,996	4,984,495
Honda Motor	Total for group 4.8	4,810,077	5,160,344	5,099,601	5,175,564	5,257,785	5,443,570	5,541,321	5,653,801
PSA/Peugeot-Citroen		3,407,873	3,339,170	3,180,611	3,320,869	3,430,220	3,368,946	3,458,610	3,513,472
Daimler		2,570,754	2,486,060	2,546,060	2,730,768	2,884,413	2,775,903	2,877,289	2,961,207
BMW		2,305,217	2,394,181	2,472,167	2,552,098	2,510,429	2,554,520	2,639,807	2,617,945
SAIC-GM-Wuling		2,065,958	2,402,628	2,409,802	2,317,400	2,331,671	2,328,605	2,335,750	2,316,838
Changan Auto		[illegible]	1,555,150	1,662,706	1,670,513	1,699,512	1,731,577	1,730,446	1,784,508
Suzuki Motor		1,519,916	1,545,124	1,497,048	1,474,405	1,473,660	1,489,002	1,507,643	1,500,742
Mazda Motor		1,492,423	1,504,392	1,508,091	1,531,509	1,558,357	1,631,965	1,637,179	1,646,070
Maruti Suzuki		1,384,864	1,525,073	1,830,685	1,948,979	1,940,320	1,920,210	1,909,310	1,908,020
Geely Group		1,155,265	1,303,136	1,470,732	1,922,514	2,055,976	2,174,529	2,242,089	2,253,520
Beijing Automotive Group		1,154,855	1,132,992	1,149,518	1,190,978	1,217,947	1,244,926	1,269,243	1,293,844
Mitsubishi Motors		974,836	988,822	1,031,220	1,061,833	1,067,120	1,068,952	1,086,906	1,146,195
Great Wall Automobile		965,040	917,291	929,584	935,643	954,675	980,636	985,000	1,007,383
Subaru		963,212	1,041,836	1,092,658	1,084,925	1,085,255	1,083,524	1,084,244	1,088,484
Tata		952,785	1,022,438	1,116,245	1,226,262	1,267,748	1,290,995	1,287,990	1,345,540
Dongfeng Motors		914,394	1,257,820	1,263,032	1,268,354	1,280,657	1,299,049	1,300,174	1,344,258

182 OEM's in the market!

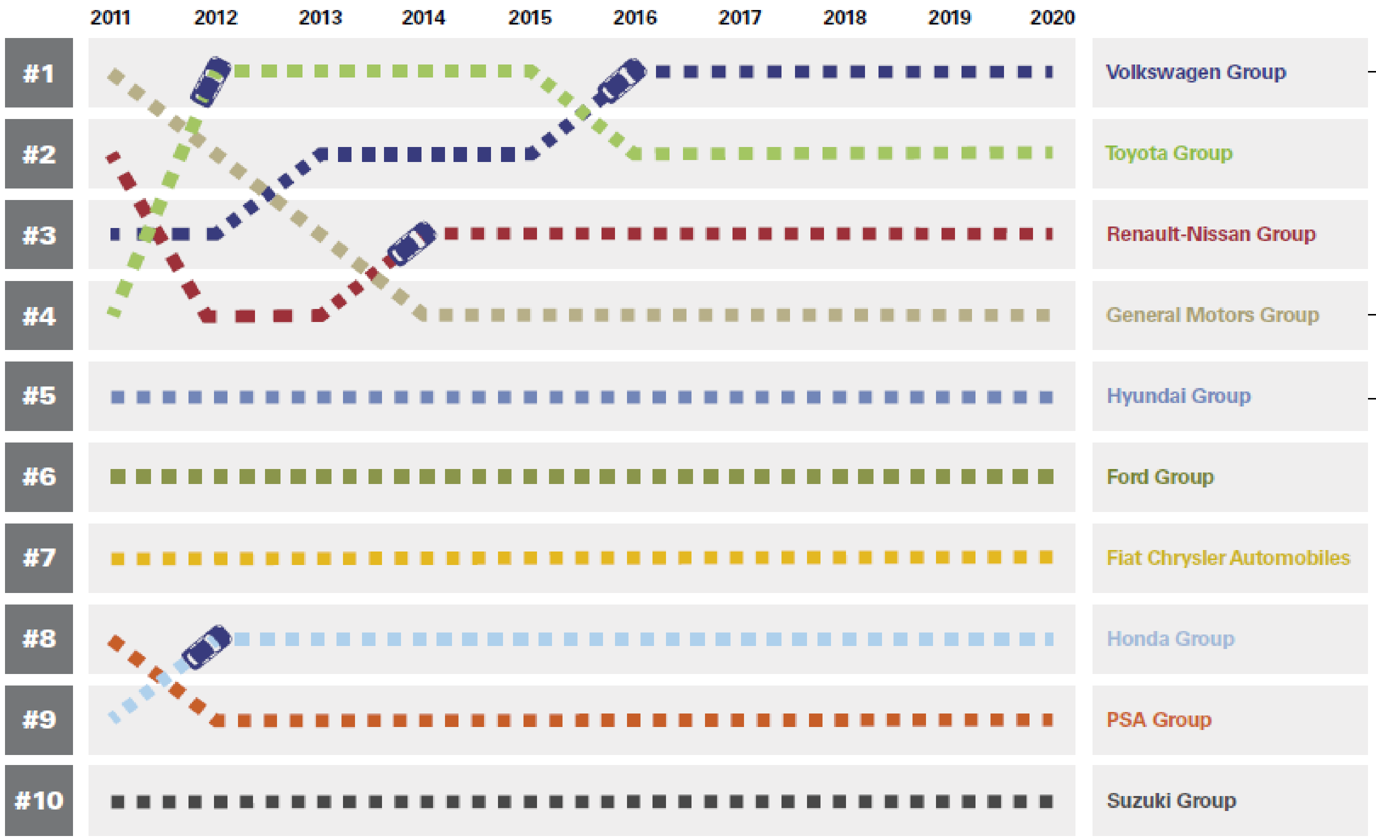
Global Production Growth

Transition from Mature Markets to Emerging Markets Intensifies



Global Automotive Rankings

Leading mass market OEMs – Sales ranking 2011-2020
Not a single emerging market OEM is predicted to make the top 10 by the end of this decade in the mass market segment



Volkswagen is predicted to take over Toyota's crown as number one mass market OEM from 2016 onwards.

GM has lost its leading position, dropping from first place in 2011 to fourth in 2014.

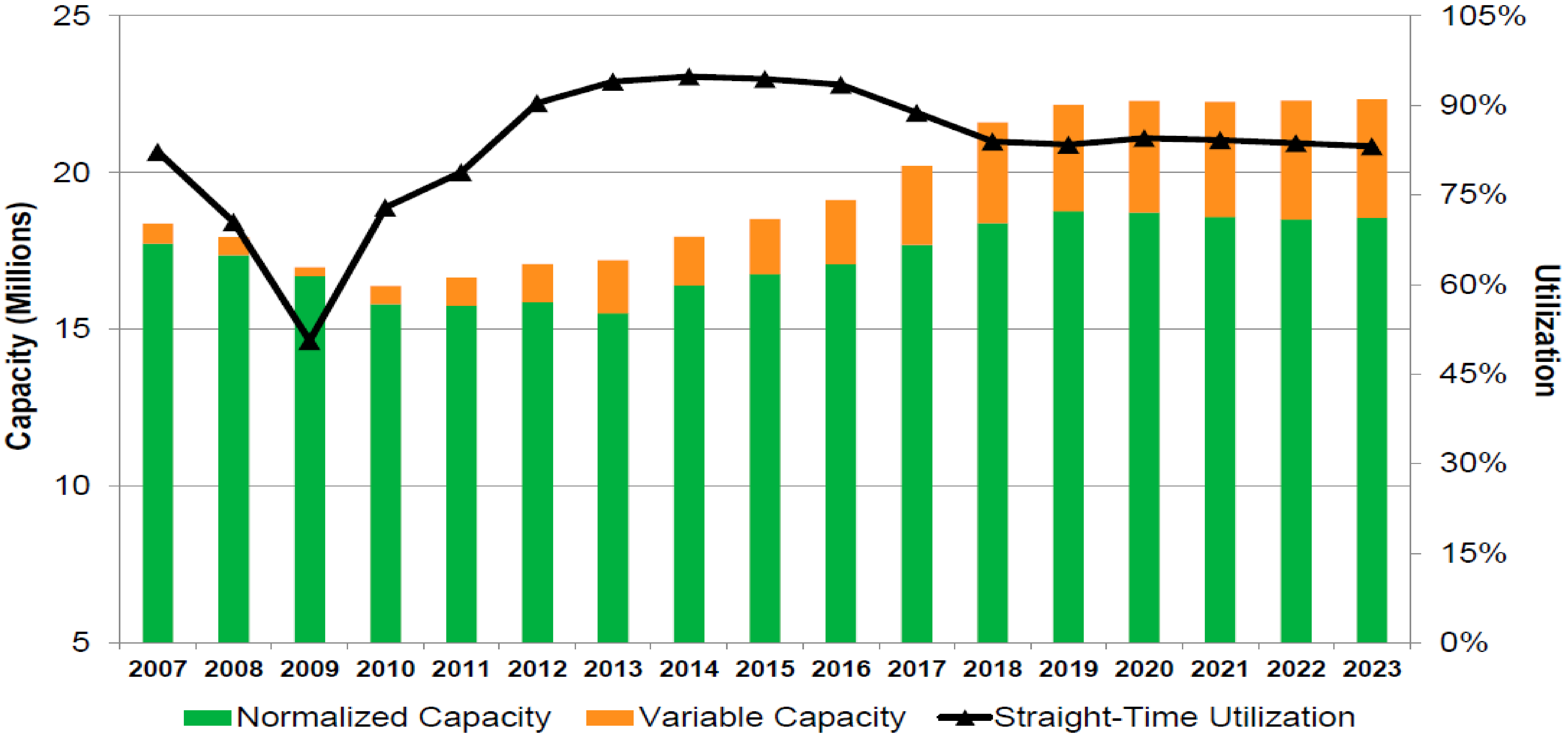
Contrary to the executives' highly optimistic views on Hyundai's prospects, the Korean automaker is forecast to remain in fifth place until 2020.

Chinese automakers are still unable to make the top 10, despite technology transfer from leading global OEMs like VW, Toyota or GM that has benefited the likes of First Automobile Works (FAW), Shanghai Automotive Industry Corporation (SAIC) and Beijing Automotive Industry Holding Co (BAIC).

Note: OEMs ranked descending by sales volume in respective year
Source: KPMG Competence Centre Automotive, LMC Automotive

North American Production Capacity

Capacity is Rebuilding, yet Utilization is Robust – For Now; Flexibility is Key

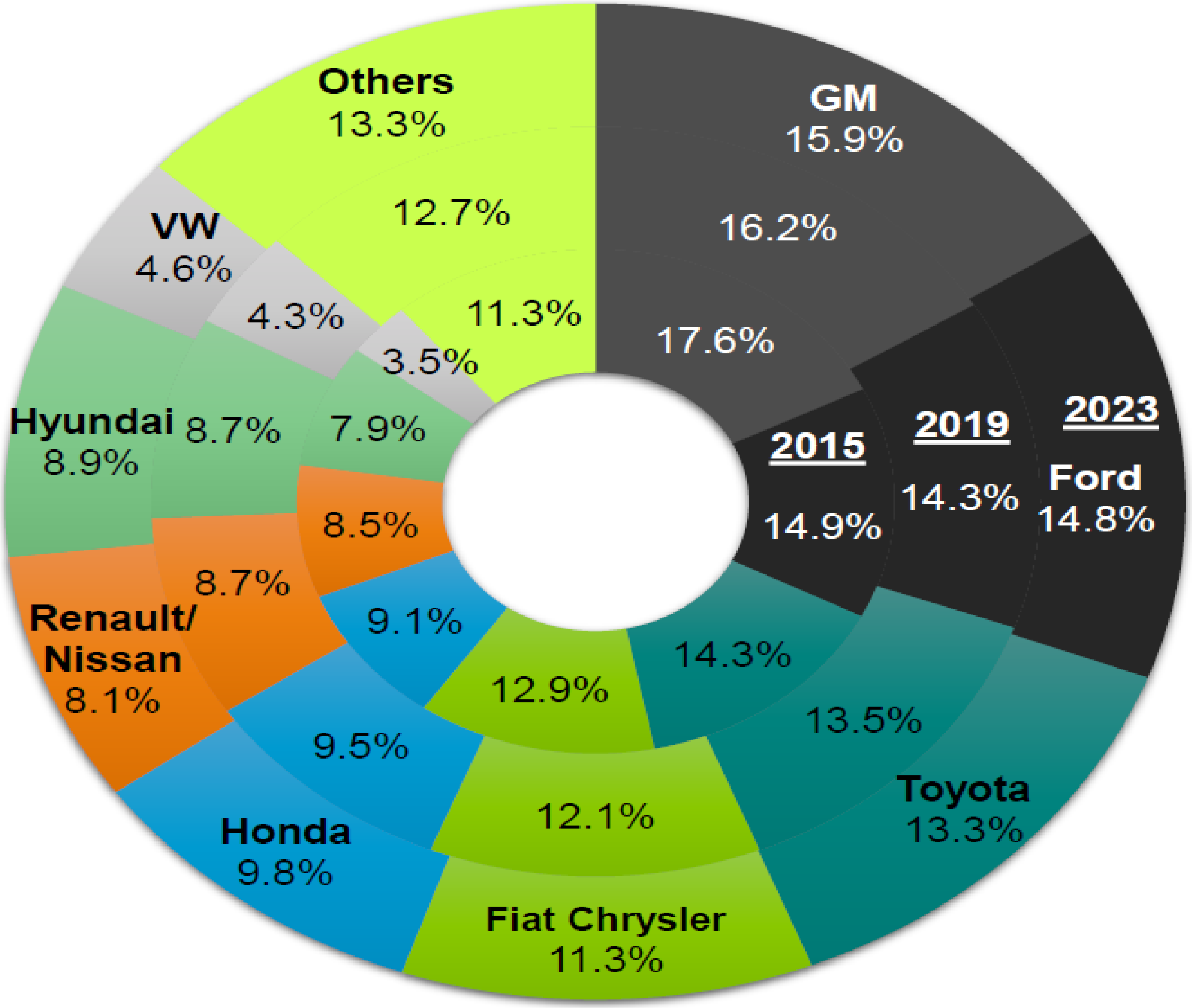


Straight-Time = Normalized + Variable Capacity

Source: IHS Markit Light Vehicle Production and Capacity Forecast

U.S.: Market Share Profile

Share Trend by Automaker (2015 – 2019 – 2023)



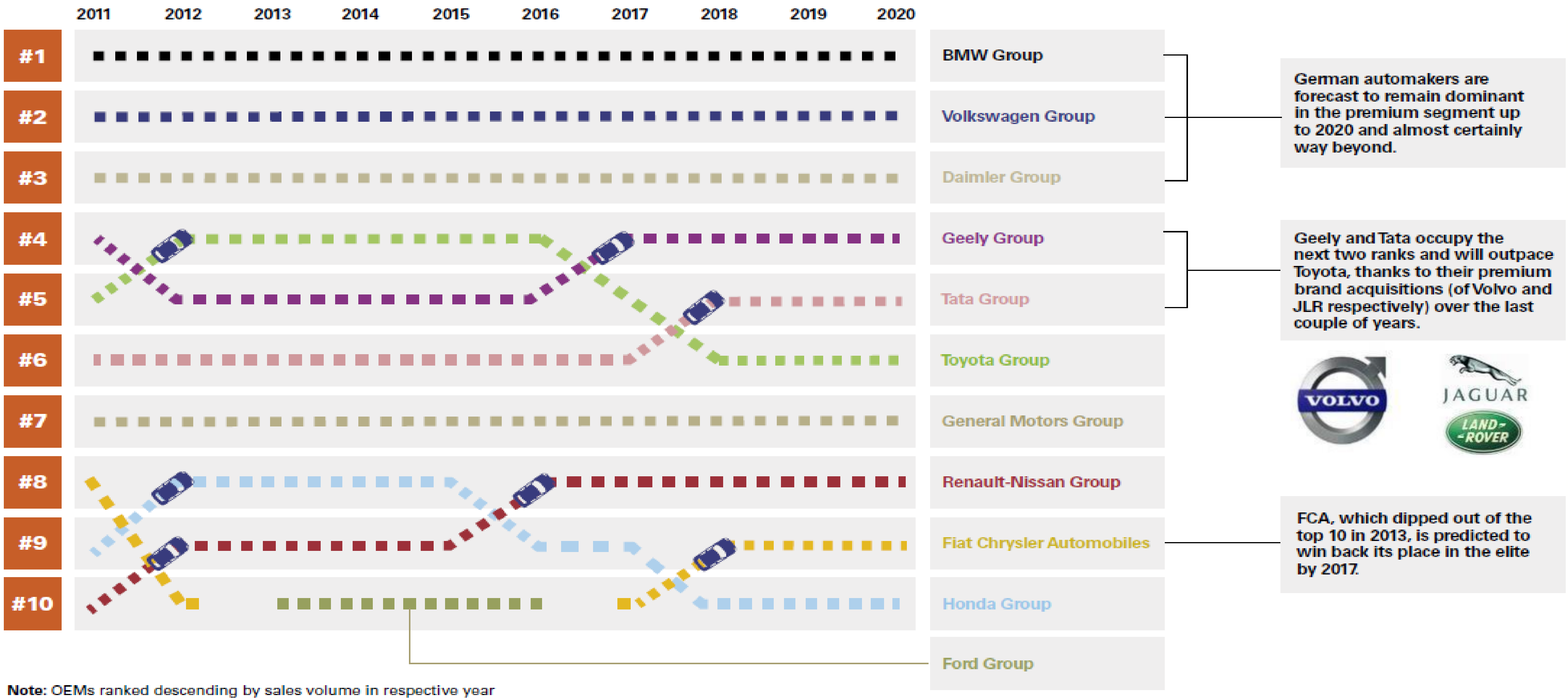
U.S. market plateaus and competition will be fierce:

- GM share faces challenges from multiple automakers and segments
- Ford share remains stable in a competitive market, supported by strong products and new offerings
- Chrysler slows the downward slide with Fiat derived product, but remains pressured in longer term
- Hyundai share expands although capacity issues could challenge growth prospects
- Japanese manufacturers stabilize to an extent – although don't return to historical levels
- VW gains somewhat as part of its focused North American efforts with new CUV products

Source: IHS Markit Light Vehicle Sales Forecast

Global Automotive: Premium Brands

Leading premium market OEMs – Sales ranking 2011-2020
German automakers are set to continue their domination of the premium segment



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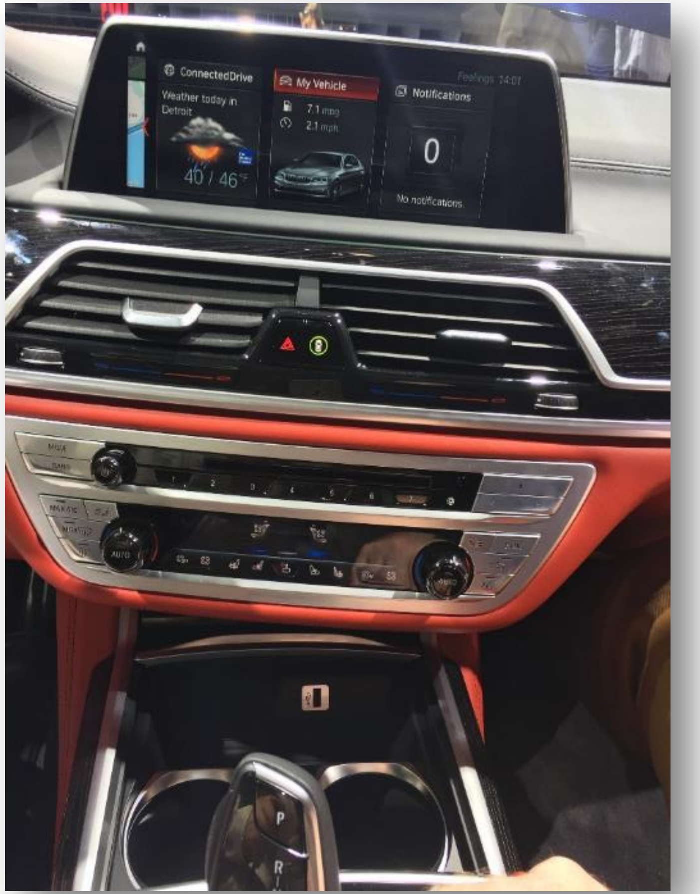
Opportunities

Dark Chrome

Dark Satin

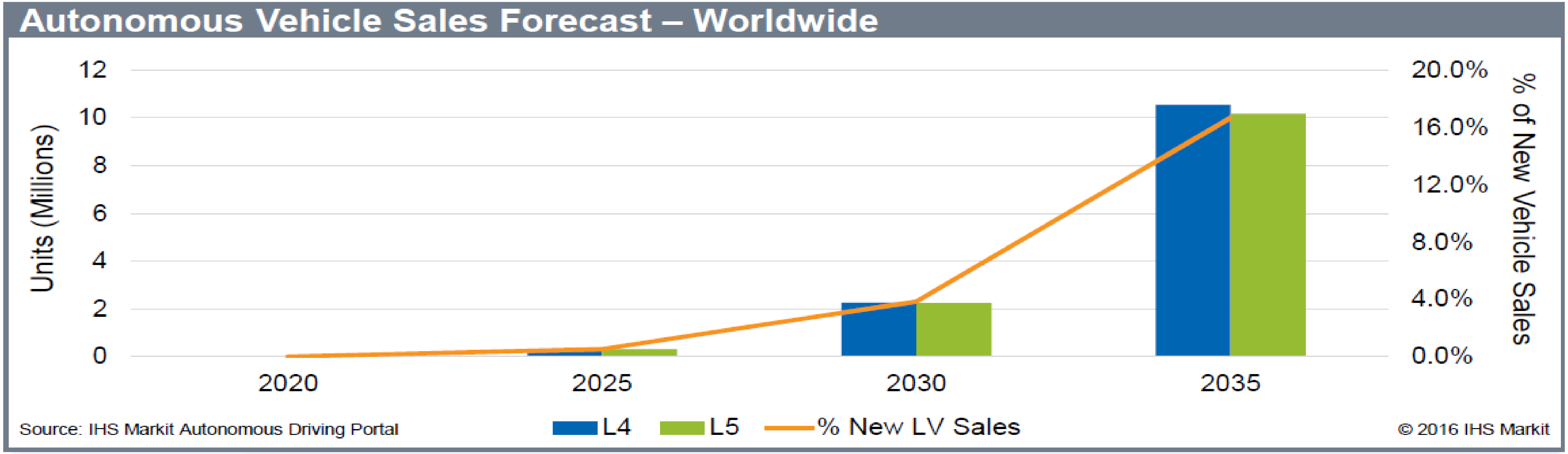
Multi Satin

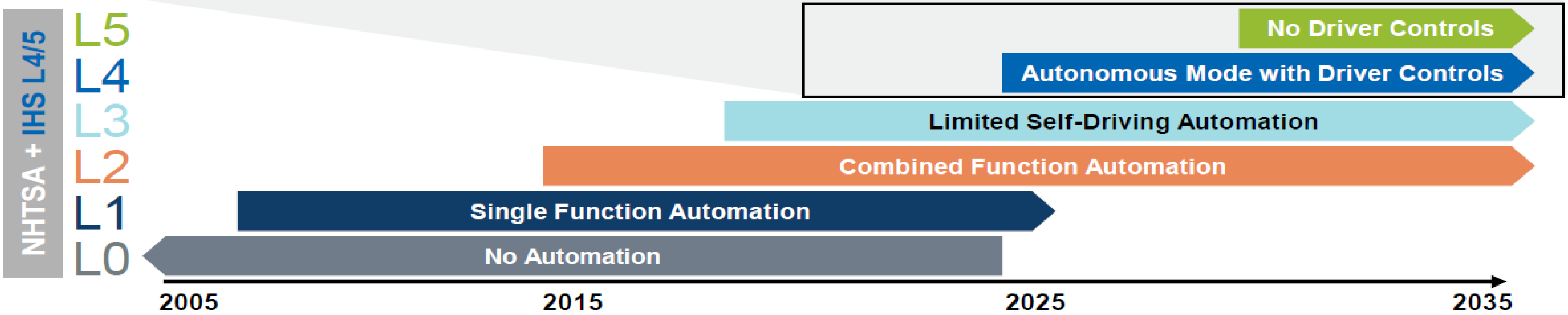

ConnectedDrive
Weather today in Detroit
My Vehicle
Notifications
0
No notifications

Industry Disruption

Automated Driving EVOLUTION

Autonomous Driving: When, Not If – But a Longer Term Proposition





Thank you for your time.