

EMEA OVERVIEW

GENERAL INDUSTRIAL

January 2023

SHERWIN-WILLIAMS®

ABOUT US

SHERWIN-WILLIAMS®

2021 REVENUES

\$19.9 billion



EMPLOYEES

61,000+



FOUNDED IN

1866



120+
COUNTRIES



4,850+
STORES



132 MANUFACTURING
& DISTRIBUTION
FACILITIES

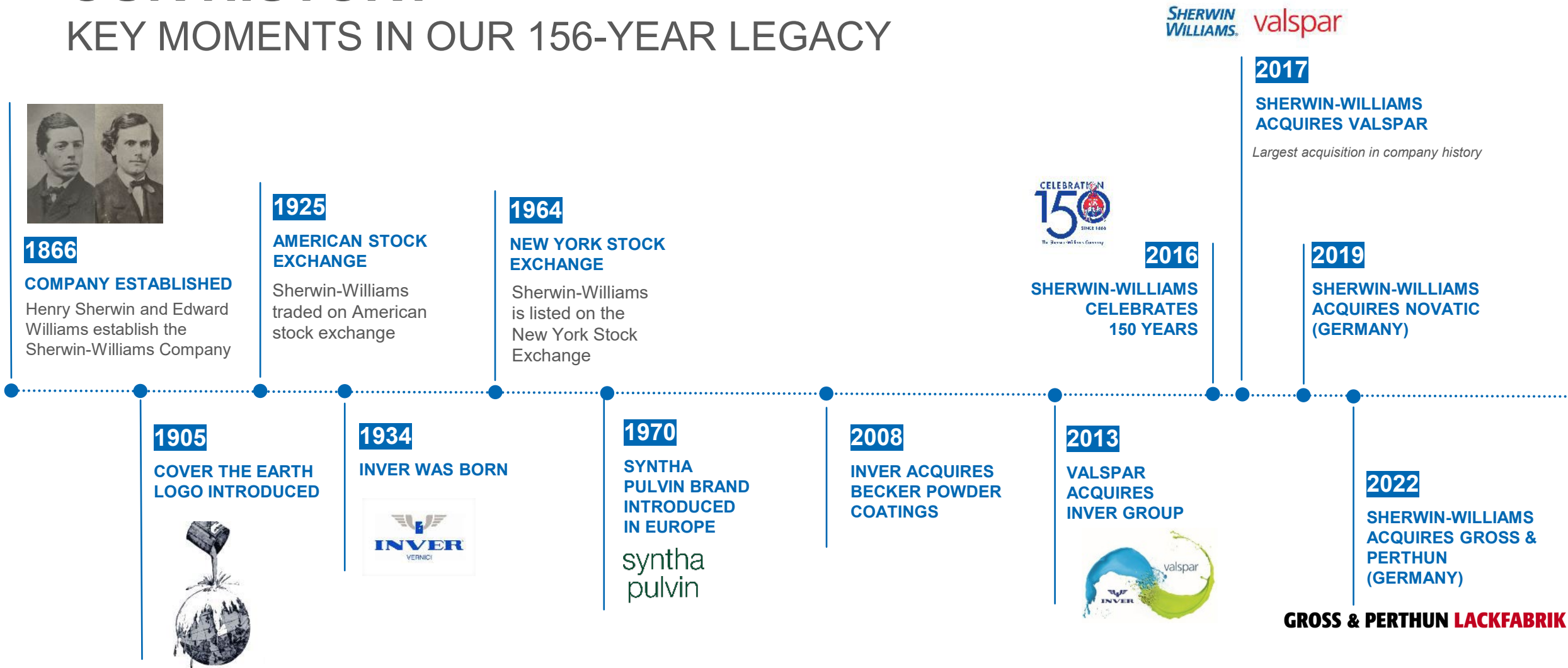
INDUSTRY-LEADING PORTFOLIO OF BRANDS



SHERWIN-WILLIAMS®

OUR HISTORY

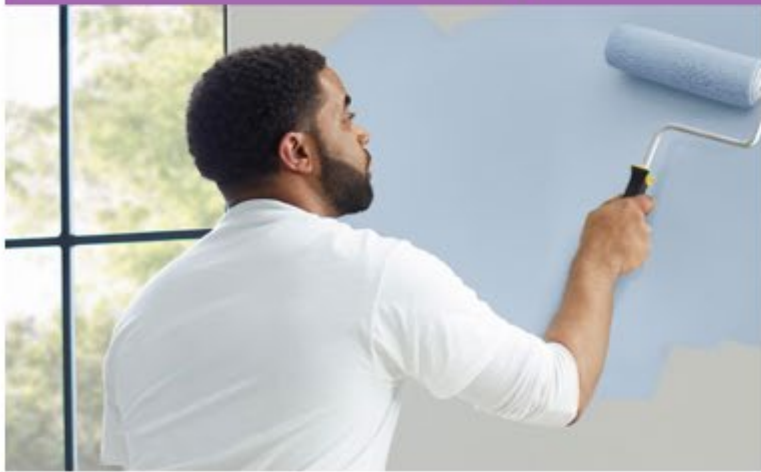
KEY MOMENTS IN OUR 156-YEAR LEGACY



SHERWIN-WILLIAMS

BUSINESS GROUPS

The Americas Group



Consumer Brands Group



Performance Coatings Group



GLOBAL SUPPLY CHAIN

2021 Year End



INDUSTRIAL SEGMENTS

Performance Coatings Group

PERFORMANCE COATINGS GROUP

INDUSTRIAL SEGMENTS

					
					
Protective & Marine	Coil & Extrusion	Automotive Refinish	General Industrial	Industrial Wood	Packaging Coatings

Provide Solutions That Customers Use to Differentiate in Their Industries

GENERAL INDUSTRIAL DIVISION

SEGMENTS OF END-MARKETS



TRANSPORTATION



GENERAL FINISHES



DESIGN



ENERGY



HEAVY EQUIPMENT



BUILDING PRODUCTS



MILITARY

MISSION

The General Industrial Coatings division of Sherwin-Williams delivers uncompromised asset protection to our customers.

We stand by these declarations. We are:

- MORE THAN COATINGS PEOPLE
- PERFORMANCE PEOPLE
- GOOD-IS-NOT-GOOD-ENOUGH PEOPLE
- FUELED BY OUR OWN CURIOSITY
- COLLABORATORS
- INNOVATORS
- NEVER-GIVE-UP-ERS
- YOUR SECRET WEAPON



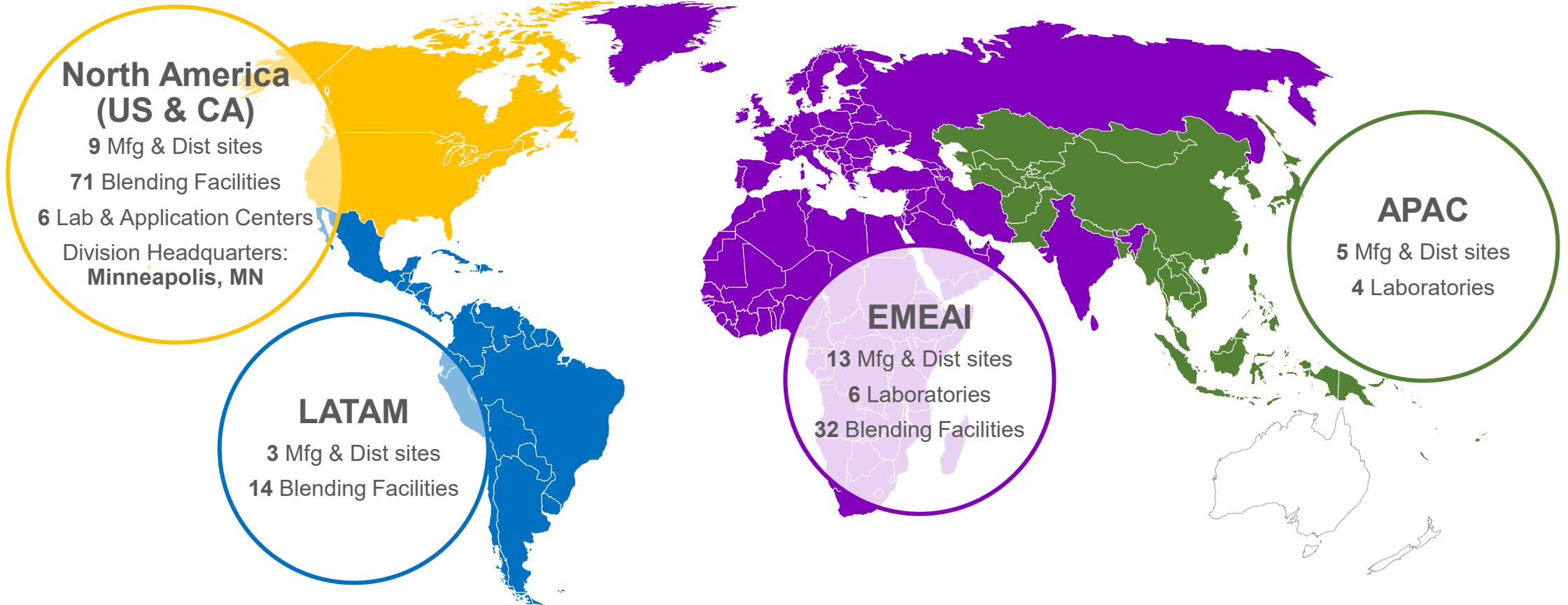


GLOBAL FOOTPRINT

General Industrial Division

GENERAL INDUSTRIAL

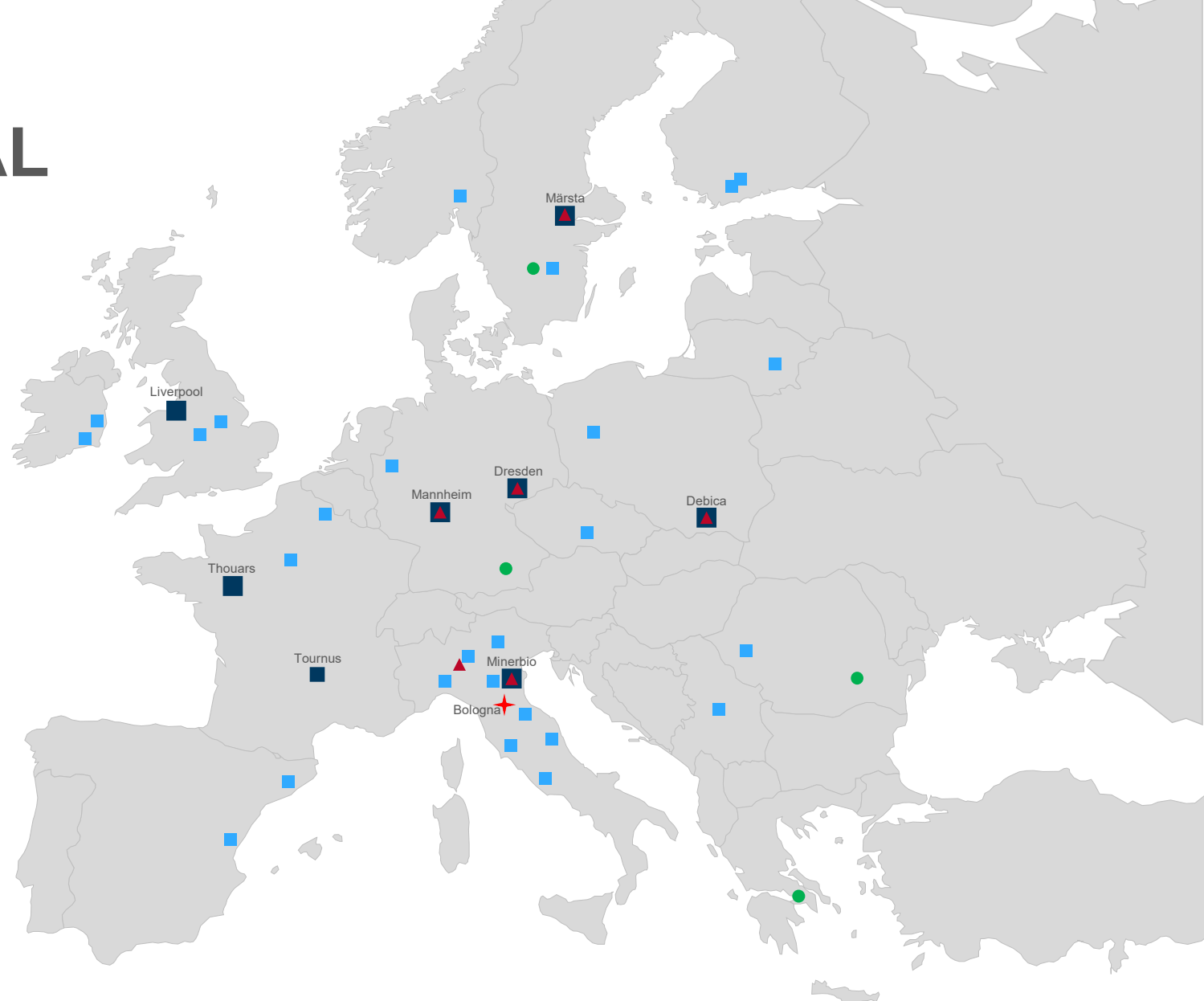
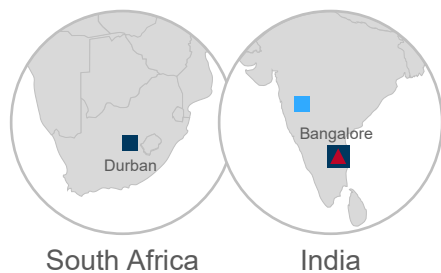
GLOBAL LOCATIONS



GENERAL INDUSTRIAL

EMEI FOOTPRINT

- Production Plants
- Blending Facilities
- Distribution Centers
- ▲ R&D Lab
- ✦ Headquarters



GENERAL INDUSTRIAL EUROPE

PRODUCTION PLANTS



MINERBIO (ITALY)



THOUARS (FRANCE)



TOURNUS (FRANCE)



LIVERPOOL (UK)



DRESDEN (GERMANY)



MANNHEIM (GERMANY)



DEBICA (POLAND)








MÄRSTA (SWEDEN)



LAB CAPABILITIES

General Industrial Division

GENERAL INDUSTRIAL PORTFOLIO

				
Liquid Coatings <ul style="list-style-type: none">• High-performance, solvent-based coatings• Eco-friendly, low-VOC, water-based coatings	Electrodeposition Coatings <ul style="list-style-type: none">• Multiple technologies• Onsite support	Powder Coatings <ul style="list-style-type: none">• Superior Edge coverage• Dry-on-Dry technologies	Aftermarket <ul style="list-style-type: none">• Aerosols 400ml• Touch-Up	Paint Service Provider <ul style="list-style-type: none">• Management of finishing operations on-site• Product & application expertise drive more efficient operations

Performance-focused Offerings

LIQUID COATINGS

Waterborne

- Eco-friendly coatings with high performance quality

Solventborne

- Thousands of finish options to achieve the exact, desired effect

High-Solids

- Contains high solids to greatly reduce VOC content

A word cloud of various liquid coating products from Sherwin-Williams. The word 'Inverpur' is the largest and most central. Other prominent words include 'Inverflex', 'Idrolin/E', 'Inverfor/OF', 'Inverplast/B', 'Inverfast/R', 'Inverbia', 'Inverplast', 'Epoxinver', 'R-Cure 800', 'Kem Aqua', 'Acrilinver', 'Polane', 'Duraspar 440', 'Invercoat A/F', 'Aquaspar 400', 'Inverair/LS', 'Idrayon', 'Inverplast AS', 'R-Cure 200', and 'Acrilinver AS'.

Inverpur

Inverfor/OF

Inverplast/B

Inverfast/R

Inverbia

Inverplast

Epoxinver

R-Cure 800

Kem Aqua

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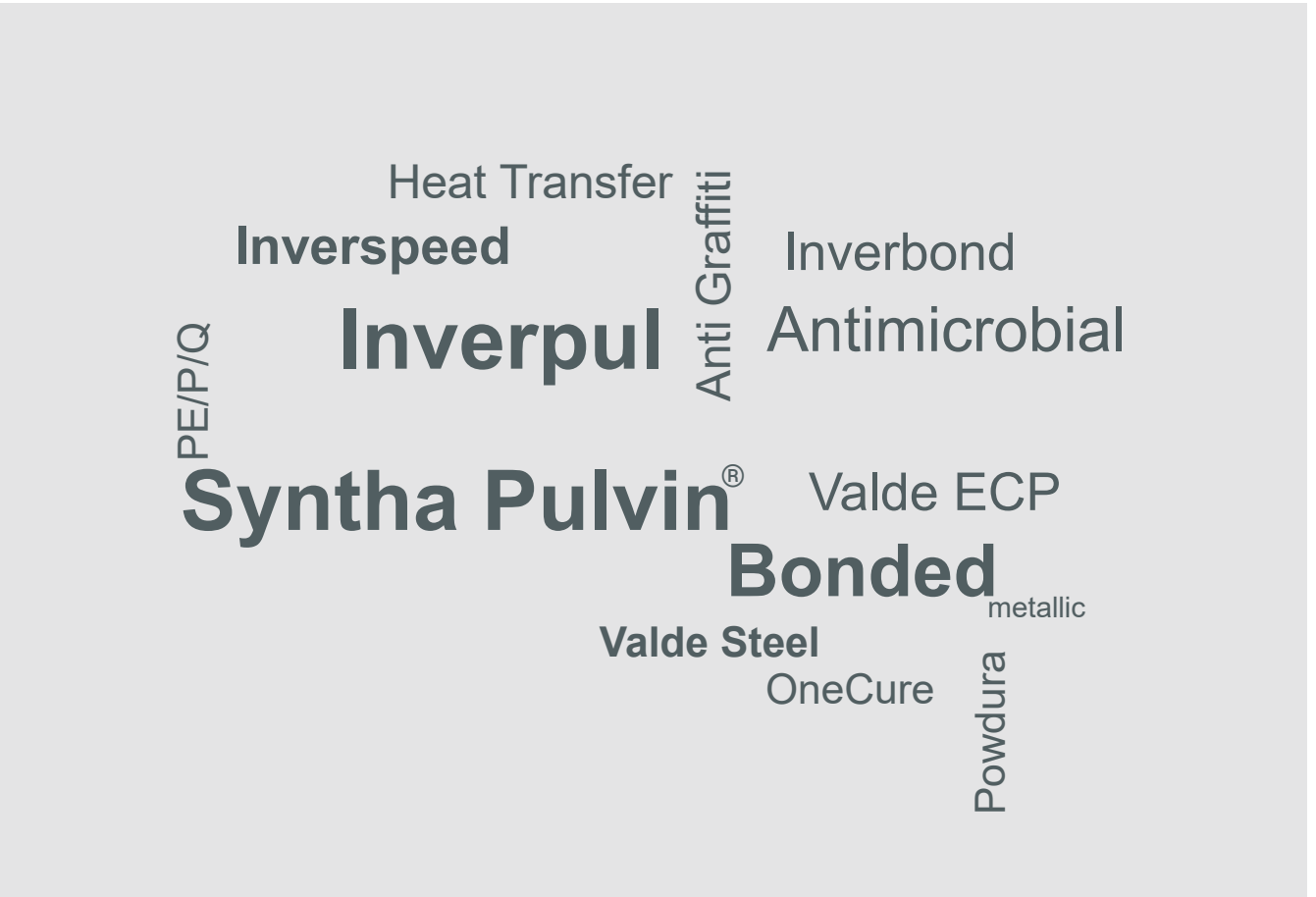
R-Cure 200

Acrilinver AS

Inverflex

Idrolin/E

POWDER COATINGS



E-COAT



- Eco-conscious method to protect metal substrates being a closed-loop industrial process
- Robust platforms to cover all needs of the industry
- Large range of products to be selected based on the strongest requirements of the industry

VECTROGARD 950E™

- Robust Cathodic Epoxy primer or monolayer with superior anticorrosion properties, high edge coverage and smoothness

VOTON™

- Robust Cathodic Epoxy primer or monolayer with superior properties, TIN FREE

V-SHIELD™

- Cathodic Acrylic primer or monolayer with excellent anticorrosion and weatherability properties for internal and external use

STRATEGIC TECHNOLOGY DRIVERS



Product Performance

Provide Custom Formulations

Improve Edge Corrosion Resistance

Increase Weathering Performance

Protect Brand



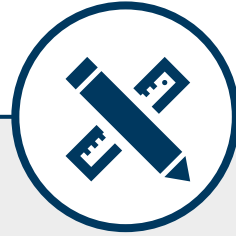
Operational Excellence

Increase First Pass Yield

Ensure High Quality Standards

Reduce Cycle Time in Factory

Shrink Manufacturing Footprint



Application Engineering

Minimize Application Costs

Maximize Operational Efficiency

Increase Coverage with Fewer Cycles

Reduce Rework



Sustainable Compliance

Reduce Solvent Emissions

Lower Energy Consumption

Eliminate Hazardous Chemicals

Reduce Waste Generation



Multi-Local Support

On-site Technical Support

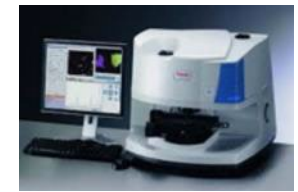
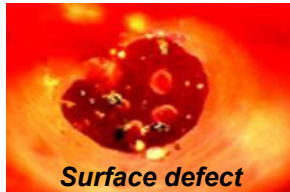
Complete Global Product Lines

Technology Transfer Capabilities

Global Account Management

TESTING AND ANALYTICAL CAPABILITIES

- Standard Quality Control Testing
- Chemical Reagent Analysis
- Salt Spray / Humidity
- Weathering (QUV, Xenon Arc, Florida, Arizona)
- Differential Scanning Calorimeter (DSC)
- Microscopy
- Cross-Sectional Analysis of Defects
- Metal Flake Orientation
- Film Build Measurement
- 3D Imaging
- Scanning Electron Microscope (SEM)
- Energy Dispersive X-Ray Analysis (EDX)
- IR Scanning
- Particle Size Analysis
- Resistivity Testing
- Application Testing
- Topographic and Phase Imaging
- Hardener to Binder
- Mix Ratio Measurement
- Advanced Analytical: XRF, SEM, NMR, FTIR, GC
- TGA (Thermal Gravimetric Analysis) and Gradient Oven
- Helium Pycnometer



CERTIFIED A2LA TEST LAB

- Fully staffed to provide complete OEM-specified testing
- SW provides plaques & reports for all types of OEM approvals



STATE OF ACCREDITATION TO ISO 9001

THE SHERWIN-WILLIAMS COMPANY*
Corrosion, Coatings, and Treatment Lab (CORROSC)
100 East Third Street
Minneapolis, MN 55402
Mailing Facility Phone: 612.375.7000

METRICSCALE

Valid Until: November 30, 2019 Certificate Number: 2027-01

In recognition of the successful completion of the A2LA evaluation process, accreditation is granted to the laboratory at the location listed above, as well as at other satellite laboratory locations listed below, to perform the following testing as follows:

Tests	Test Method(s)
Environmental Exposure	
Appearance Examination	ASTM D2670, ASTM D2 104-01, D2 104-04
Conditioning of Coatings for Testing	ASTM D2654
Cyclic Corrosion	GM9111P (Superseded 2010) ¹ GM9100P (Superseded 2010) ¹ GM9104 (Superseded 2010) ¹ ASTM B117 (2016), B117-09 (1996), SAE J2331 (Automotive 7.7 Salt Fog only), & 7.2 D50 only
Flexibility	ASTM D2270, D2247, D4880, D20120
Salt Fog	ASTM B117, ASTM B117-09 (1996), GM9100P (Superseded 2010) ¹ , GM9104, D20120
UV Weathering	ASTM D2430, D2430-03, D20120, D20120 SAE J2344 (Superseded 2010) ¹ , D20120
Mechanical Testing	
Adhesion/Water Resistance	ASTM D2654, GM9100P (Superseded 2010) ¹
Adhesion	ASTM D2654, ASTM D2 104-01, GM9100P (Superseded 2010) ¹ , GM9104, D20120
Coil Resistance	ASTM D2670, GM9100P (Superseded 2010) ¹ , GM9104, SAE J2344 (Automotive 7.7, D20120)

(A2LA Cert No. 2027-01) Revised 05/07/2018 Page 1 of 2

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DIFFERENTIATORS

General Industrial Division

GENERAL INDUSTRIAL DIVISION

DIFFERENTIATORS



**MORE THAN 120
BLENDING
FACILITIES**



**SUBJECT
MATTER
EXPERTISE**



**GLOBAL
& LOCAL
EXECUTION**



**PRODUCT
DEPTH &
BREADTH**

We Offer More Than Coatings

COMPLETE DEVELOPMENT SUPPORT

DELIVERING DIFFERENTIATED SOLUTIONS



Color & Design

- DesignHouse®
- Tailor-made colorimetric software
- Trends & innovation

Design Engineering

- Lean 6 sigma
- Lean manufacturing
- Improving coating solutions

Application Centers

- Application booths and equipment
- Tests on original supports

Product Testing

- Complete ASTM logs
- Centers of excellence
- Color matching

Customer Line Trial

- Local tech service
- Drop-in solutions
- Qualification online

Finished Product

- Speed to market
- Made to Stock products
- Tailor-made solutions

Performance-Focused Offerings

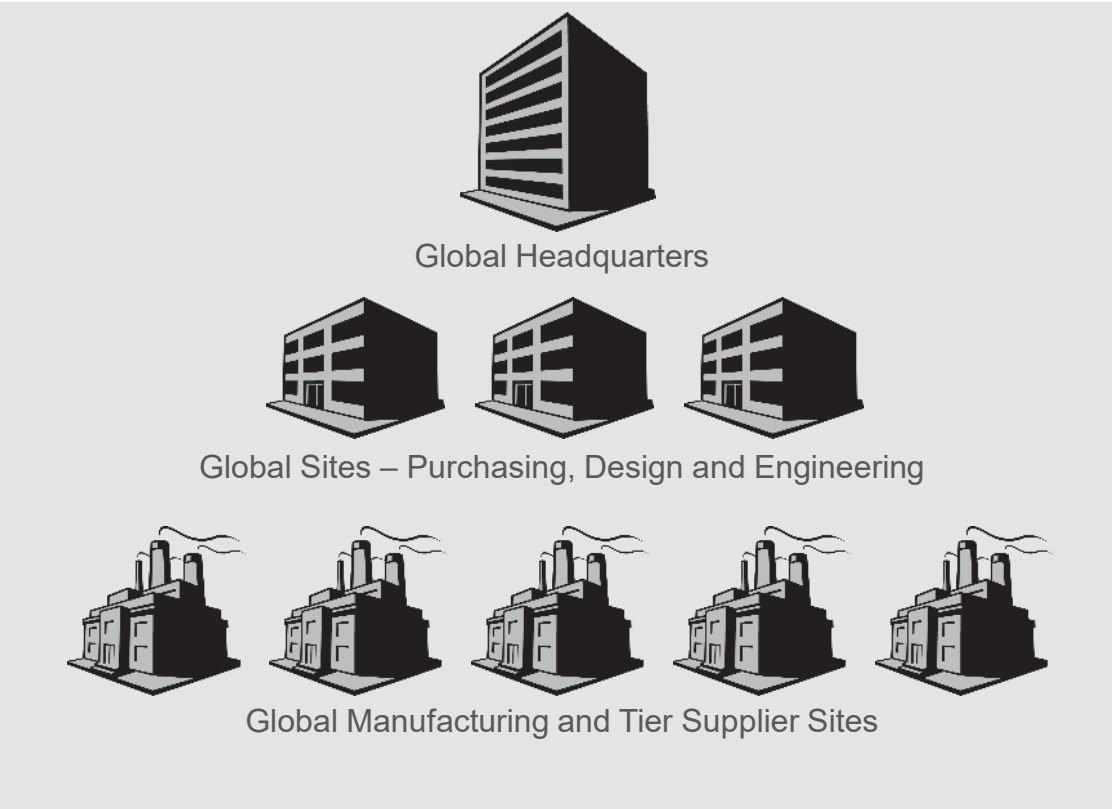


GLOBAL ACCOUNT MANAGEMENT

General Industrial Division

GENERAL INDUSTRIAL DIVISION

GLOBAL REACH, LOCAL SUPPORT



Multi-site Strategic Accounts

GENERAL INDUSTRIAL DIVISION

GLOBAL ACCOUNT MANAGEMENT



Broad Sherwin-Williams reach ensures consistent service & product performance on a global scale

Single Point of Contact

- Manufacturing
- R&D centers
- Multi-regional resources
- Multi-cultural resources
- Operational staff
- Executive management

Innovate with Speed

- Duplicating innovative technologies
- Enabling seamless integration of new solutions to maximize ROI

Driving Best Practices Worldwide

- Sharing process improvements
- Paint line performance tested through Lean Six Sigma, using industry expertise to drive cost savings programs
- Environmental stewardship through innovative technology, standardized product specifications, and expertise

Your Business is Our Obsession



LOCAL SERVICE MODEL

General Industrial Division

GENERAL INDUSTRIAL DIVISION

LOCAL SERVICE MODEL



Provide a Local Service Model That Makes it Easy to Do Business

GENERAL INDUSTRIAL DIVISION

GLOBAL REACH, LOCAL SUPPORT



General Industrial Sales and Support

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