



SPECIALTY COATINGS FOR INNOVATIVE MATERIALS

Gianluca Belotti



THIS IS STAHL

Stahl is world leader in speciality coatings and treatments for flexible substrates.

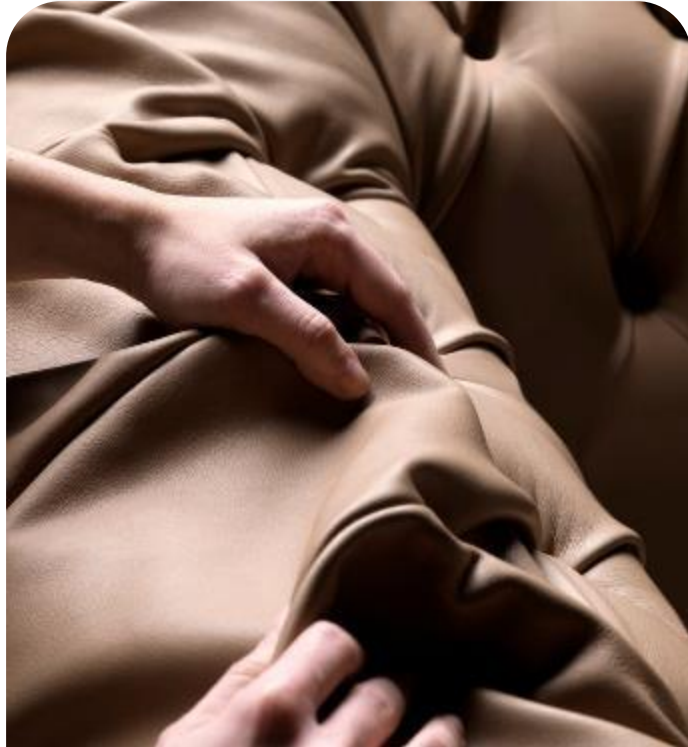
“Around the world, nearly 2000 Stahl colleagues are driven by a clear purpose: Touching lives, for a better world.”

Maarten Heijbroek, CEO Stahl



STAHL'S BUSINESS UNITS

Stahl is world leader in speciality coatings and treatments for flexible substrates.



Leather



Performance Coatings



Packaging Coatings

STAHL'S WORLDWIDE COVERAGE

€1 billion global sales

35+ Application Labs

Nearly 2,000 employees

Presence in 25+ countries

Distribution in 70+ countries

450 Golden hands



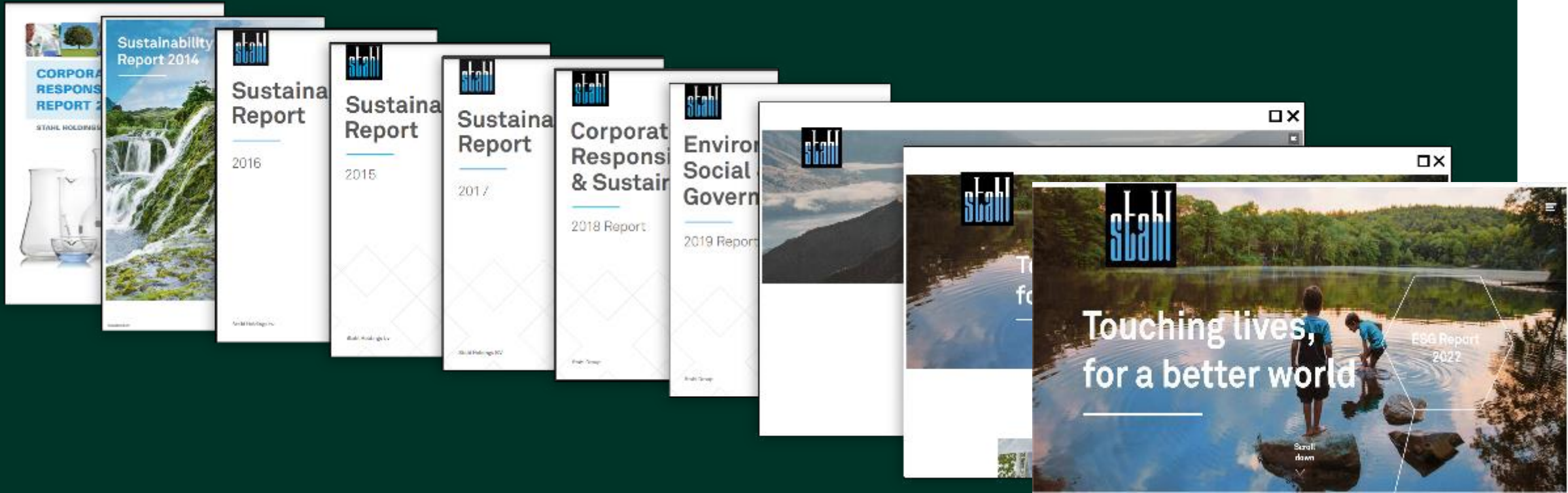
☆ 9 Centers of Excellence

🧠 13 R&D Centers

● 16 Manufacturing Sites



A DECADE OF SUSTAINABILITY LEADERSHIP



GOVERNANCE - ESG RATINGS

For Stahl and its supply chain

OUR JOURNEY BEGAN IN 2015



ECOVADIS RATING

Only the top 1% of companies worldwide are platinum-rated.

- Extended our emissions reduction targets to include Scope 3

FUELLING THE FUTURE



- Ensuring that we always use top notch technologies
- Increasing the sustainability of our technology portfolio
- Discovering new technologies to tackle new markets and applications

Technology Scouting



- Bringing great new technologies to market faster
- Learning about new technologies and markets
- Ensuring a future-oriented business portfolio

Startup Collaborations



- Developing new businesses
- Fostering adjacent business opportunities until they are mature
- First internal incubator on coatings for Advanced Flexible Substrates

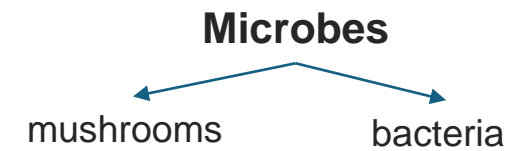
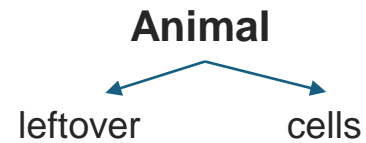
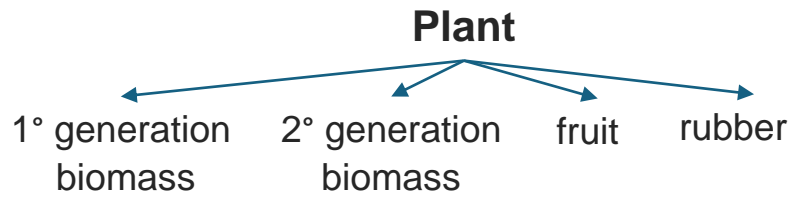
Internal Incubator

NEW MATERIALS

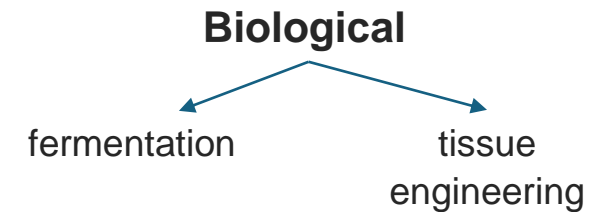
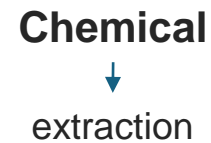
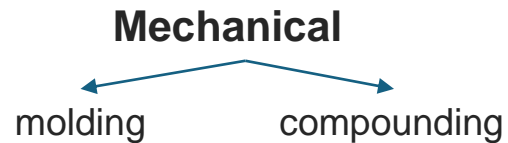


NEW MATERIALS

1. Main feedstock



2. Manufacturing Process



3. Final product

Vegan

Mycelium

Bacterial

Recycled

Lab-grown

VEGAN MATERIALS

Strength:

performance, availability, pricing

Weakness:

fossil content, market positioning, coating adhesion

Opportunity:

applicability in the automotive sector, waste reuse

Threat:

public perception

MYCELIUM MATERIALS

Strength:

market positioning, novelty, low fossil carbon content

Weakness:

performance, manufacturing capacity

Opportunity:

exclusivity, local supply chain, end of life

Threat:

expectations, costs, aging

BACTERIAL / LAB GROWN MATERIALS

Strength:

aesthetic, sustainability

Weakness:

costs, size, availability, coating adhesion

Opportunity:

luxury segment, compatibility with existing processes

Threat:

scalability

RECYCLED MATERIALS

Strength:

cost competitive, availability, circular

Weakness:

aesthetic, performance, glue/solvent content

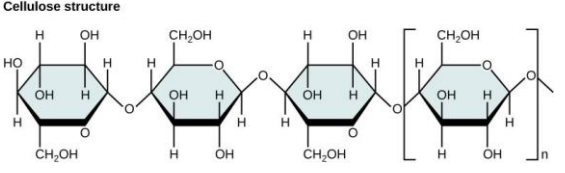
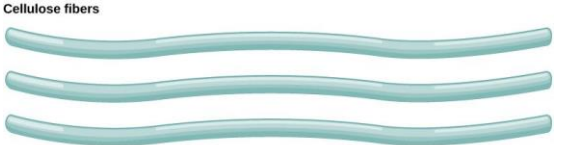
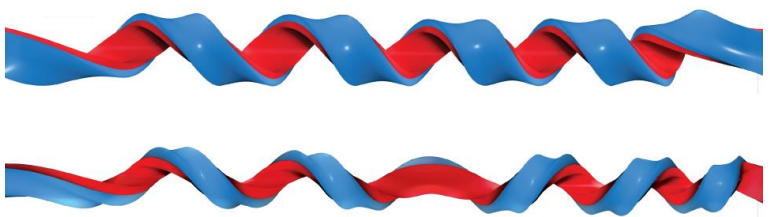
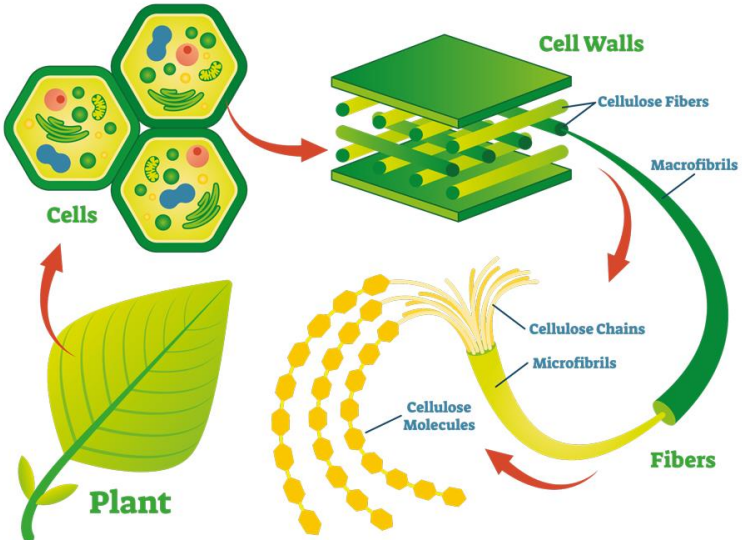
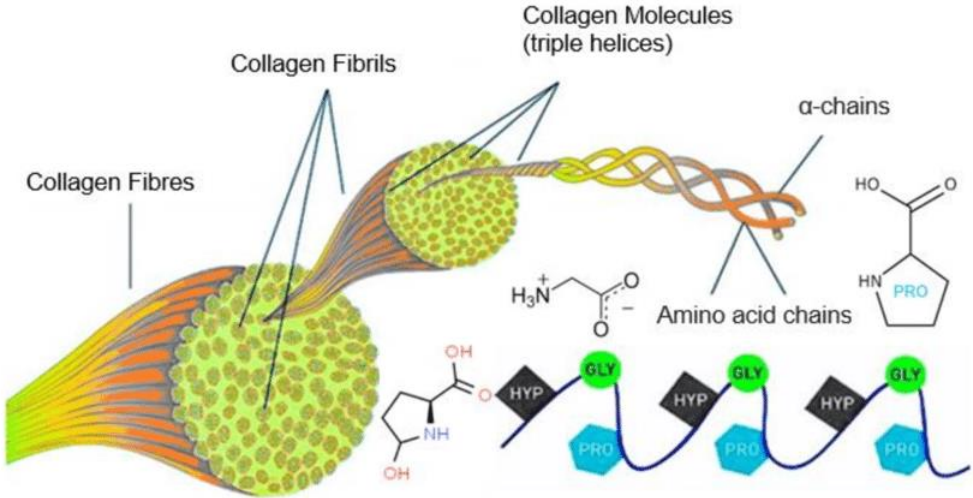
Opportunity:

integration in the supply chain

Threat:

control over raw material

WHAT'S THE DIFFERENCE?



STAHL'S SOLUTIONS



- Ympact & Nuvera Renewable Carbon Polymers
- Stahl Neo Reagents compliant with ZDHC and MRSL
- Ascender Innovative Processing

Already Available



- Biobased innovative ingredients
- Fermentation innovative ingredients

Coming Soon



- 100% biobased polymers
- New chemistry for alternative materials

Long Term



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