Start with the Golden Circle … and get inspired!

Frank Donkers

European Market Development Director

Kingspan Ltd.

Kingspan®

Energy Saving Buildings

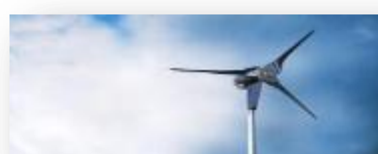
Kingspan At A Glance

- A world leader in high performance insulation, building fabric, and solar integrated building envelopes, with market leading positions in UK, Mainland Europe, USA, Australasia and GCC
- 4 Divisions:

Insulated Panels 58%

Insulation 25%

Environmental 8%



Access Floors 9%

Kingspan Journey

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Late 1965

Kingspan founded by Eugene Murtagh as a small engineering business.

1970's

Start of the small-scale manufacture of environmental products and insulated panels.

1980's

Expansion to Northern Ireland/UK (sales & distribution outlets + manufacture of Insulated Panels and Insulation Boards).

1989/1990

The Group floats on the Irish Stock Exchange. Further expansion in Europe, USA and Australia

2000-2014

Rapid growth in EU, Australasia & SEA. Acquisitions in USA and in CA & EU: incl. Thyssen Krupp CG (a.o. Hoesch and Isocab) and Rigidal Industries LLC

Main brands

Kingspan Insulated Panels	Kingspan Insulation	Kingspan Environmental
BENCHMARK By Kingspan	OPTIM-R™	Klargester
HOESCH BAUSYSTEME	KoolDuct®	TITAN
ems	Kooltherm®	KingspanWater
isocab	Selthaan®	Kingspan SOLAR
	Therma™	Tate®
	iSoEasy®	

Kingspan Today

€1,790.3m Group Turnover FY13

Trading Profit FY13 **€ 122.8m**

57 Countries with manufacturing plants or sales offices

Countries in which we sell **85**

~6,000 Employees worldwide

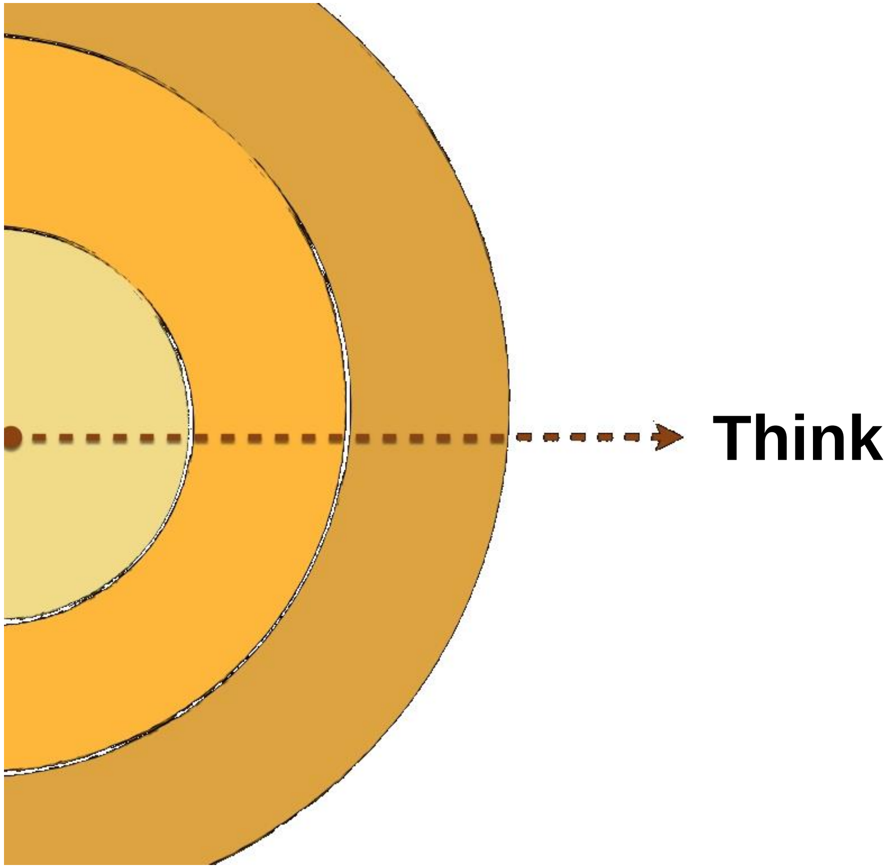
Kingspan In A Nutshell

Kingspan
Energy Saving Buildings

Revenue	Products	Drivers	Geography	Sector	End Market	Channel	Profit
€ 1.8 Billion	Insulated Panels 58%	Energy Efficiency & Conversion 85%	Mainland Europe 39%	Commercial & Industrial 60%	New Build 70%	Direct 75%	€ 123 Million
	Insulation 25%	Others 15%	UK 34%	Residential 20%	Refurbishment 30%	Via distribution 25%	
	Access Floors 9%		North America 13%	Office & Data 20%			
	Environmental 8%		ME / Turkey 4%				
			Australasia 4%				
			Ireland 4%				
			Other 4%				

Start with the Golden Circle

A principle grounded in the tenets of biology.



Sustainability Vision

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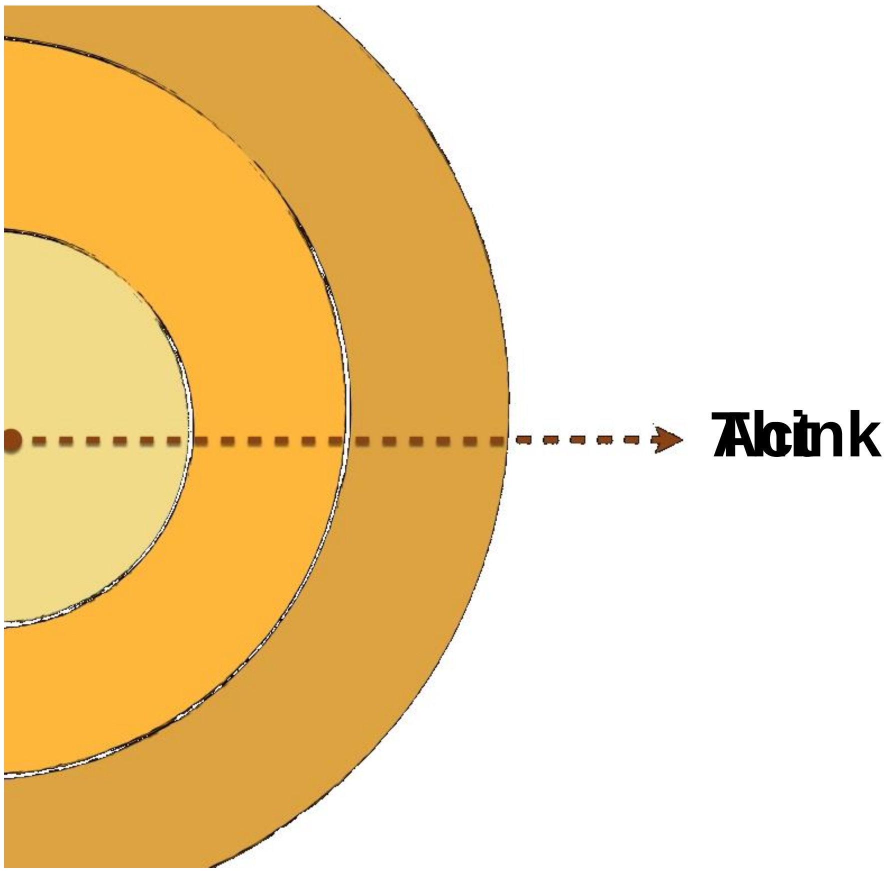
“To be a global leader in sustainable business and establish a leading position in providing sustainable, renewable and affordable best practice solutions for the construction sector”

Start with the Golden Circle



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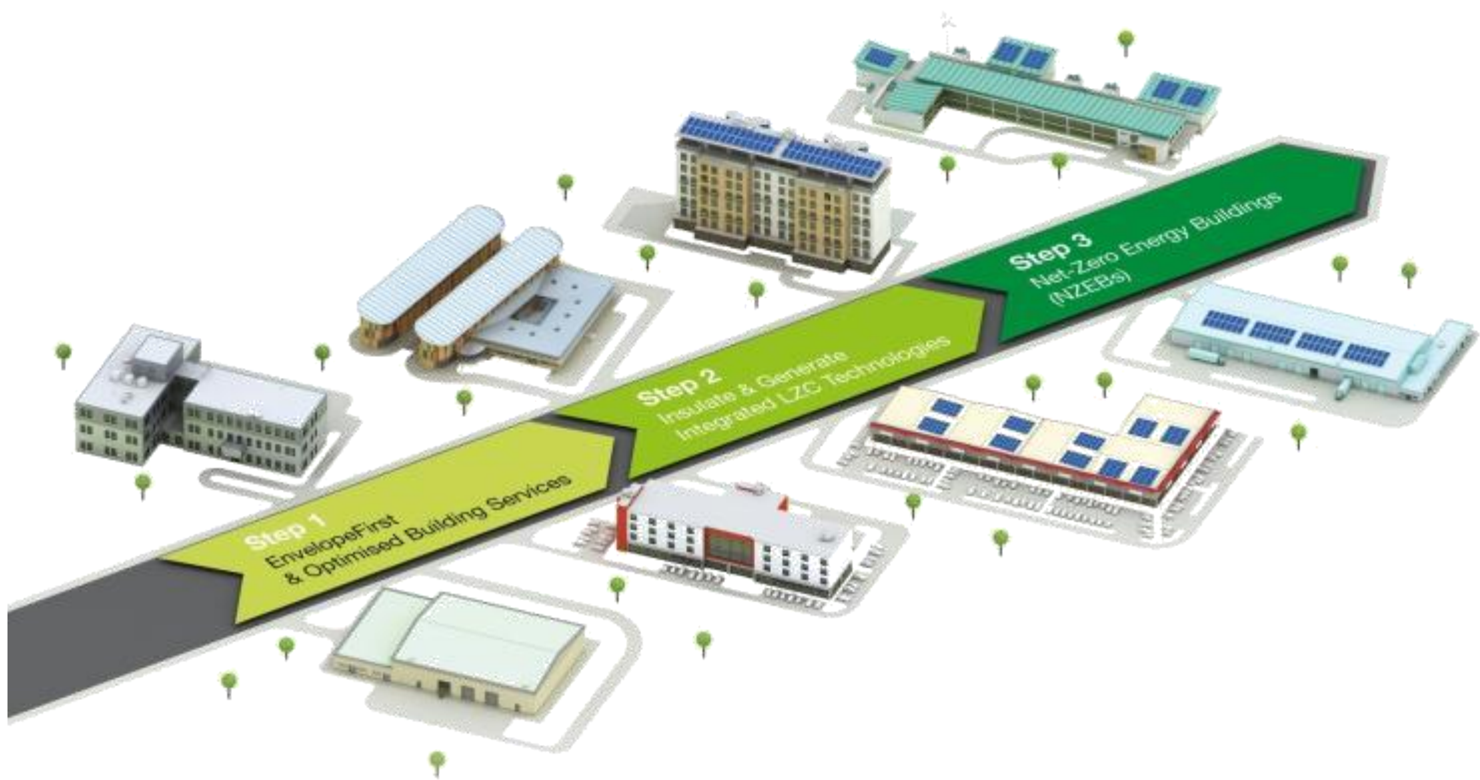
“...building insulation is the most cost-effective solution to reduce energy and greenhouse gases.”

Source: McKinsey Global Institute

Energy Saving Buildings

Kingspan's envelopefirst strategy for optimising a building's insulation performance.



Why Green Buildings?

1 Green Buildings **reduce operating, utility and carbon costs**

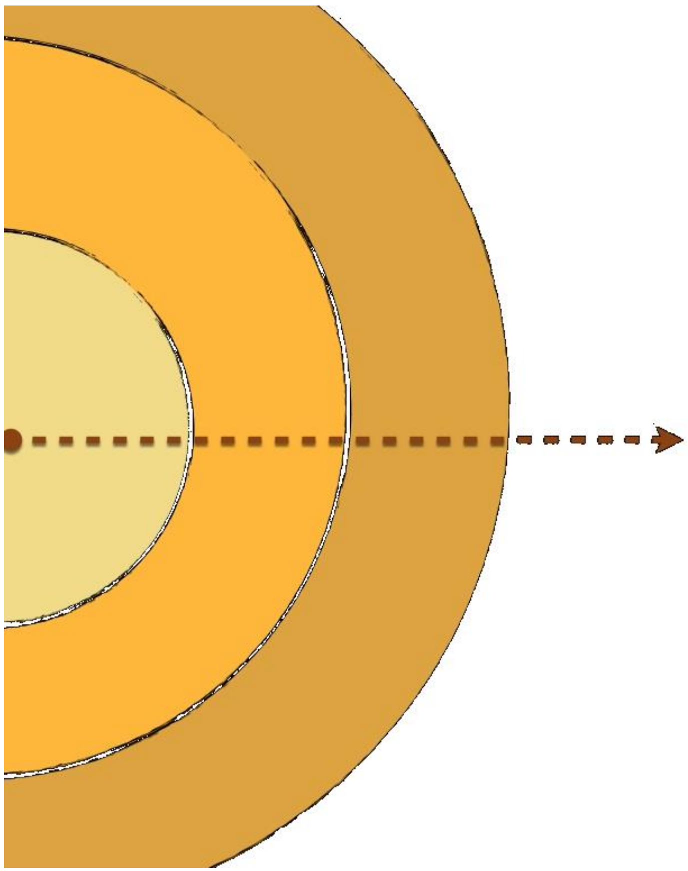
2 Green Buildings are a **competitive differentiator**

3 Green Buildings **attract tenants and enhance retention**

4 Green Buildings **protect against property obsolescence and depreciation risk**

5 Green Buildings **improve occupier productivity**

Start with the Golden Circle



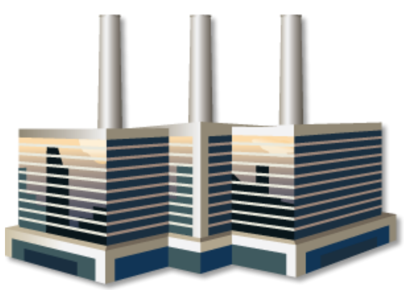
Act

Communicate

EuroACE

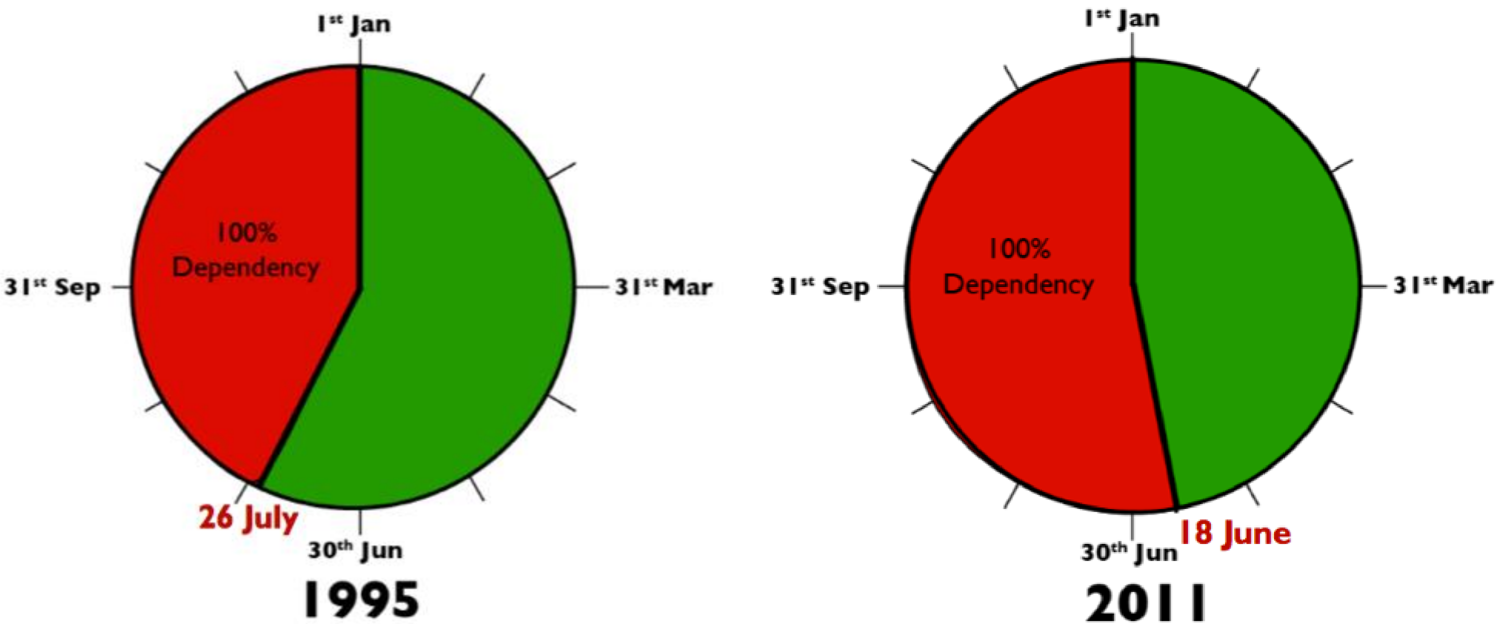
The European Alliance of Companies for Energy Efficiency in Buildings

More than 300,000



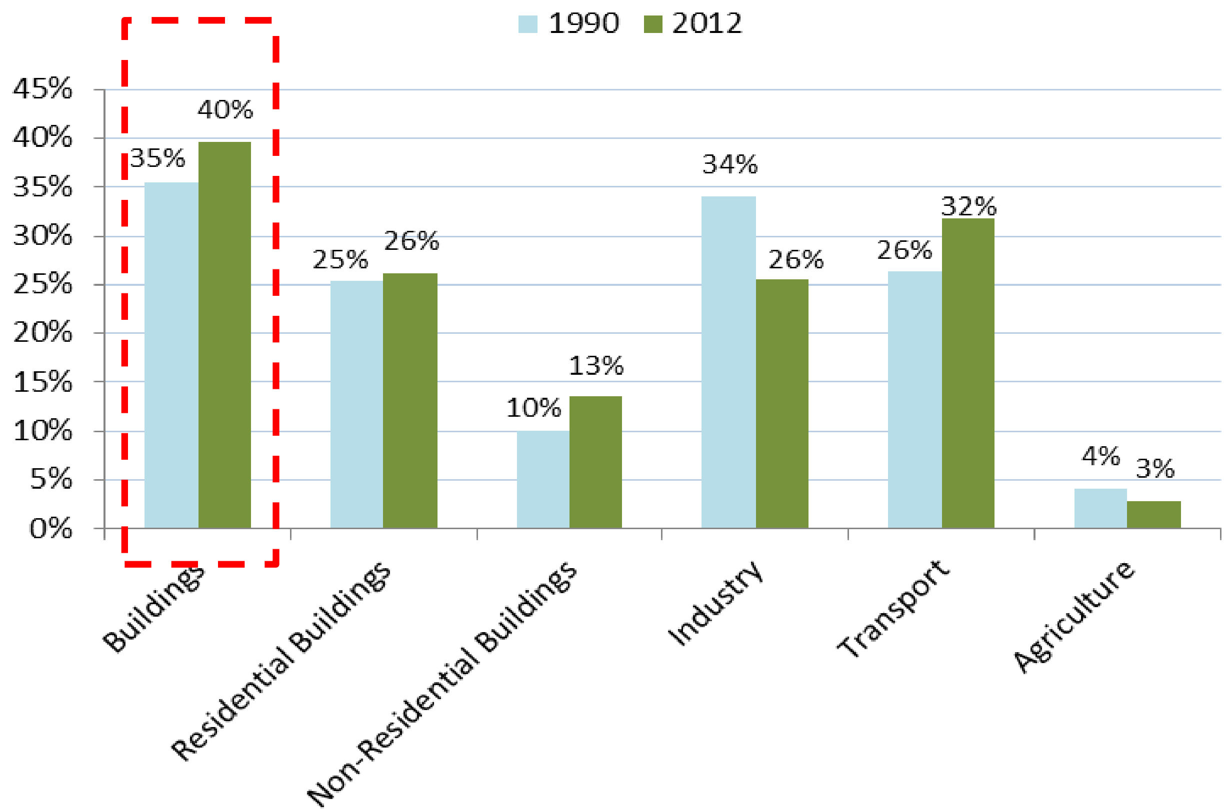
More than 770

Energy Dependence is Growing



Energy Dependence is growing based on statistics from Eurostat of the overall dependence of the EU on energy imports.

Share of Buildings in EU Energy Use



Highest Share of Energy Use

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Highest Savings Potential

Obstacles causing the energy gap

Main obstacles:

- Making costs and benefits transparant prior to investments
- Investor guarantee on energy savings before decision making
- Large investments and long payback period
- Split incentives
- Lack of engagement between stakeholders
- Lack of pressure from governments, users and consumers
- Currently only ‘low hanging fruits’ are being picked
- Lack of knowledge and competences at several stakeholders
- Problems with permits and regulations

https://www.ing.nl/media/ING%20-%20Energiebesparing%20in%20bestaand%20vastgoed%20-%20maart%202014_tcm162-32707.pdf

The Fraunhofer ISI Report on 2030

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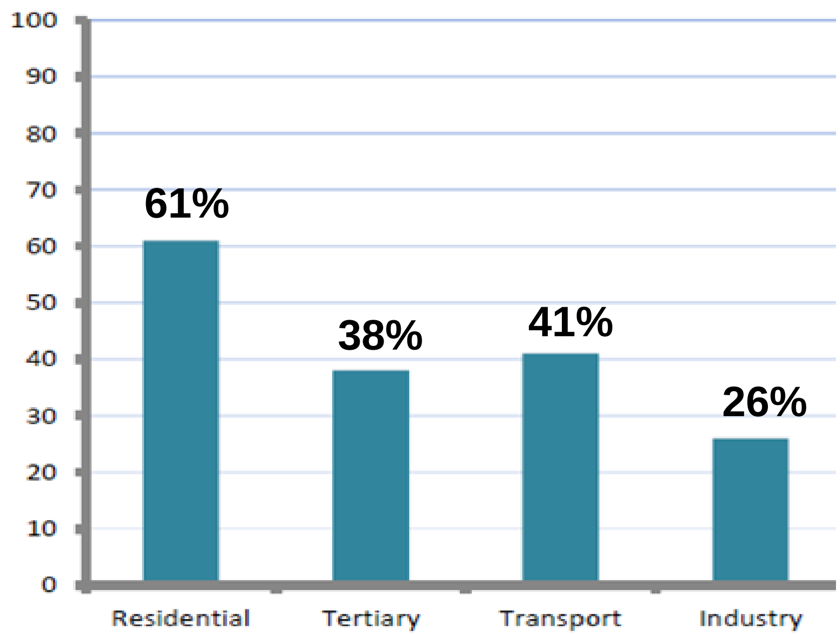

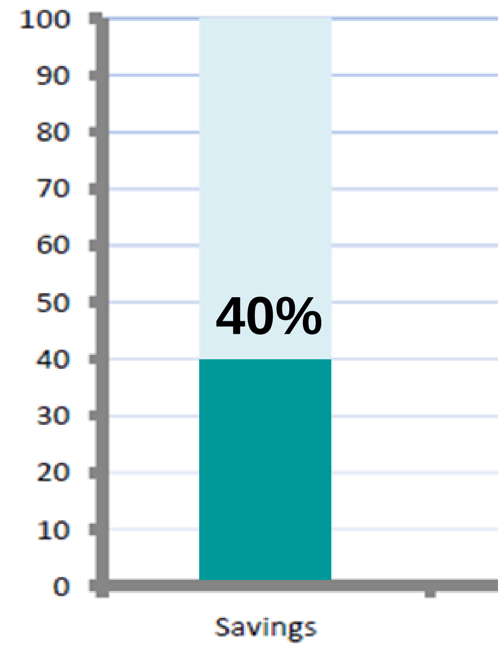

Sectoral Cost-Effective Contributions

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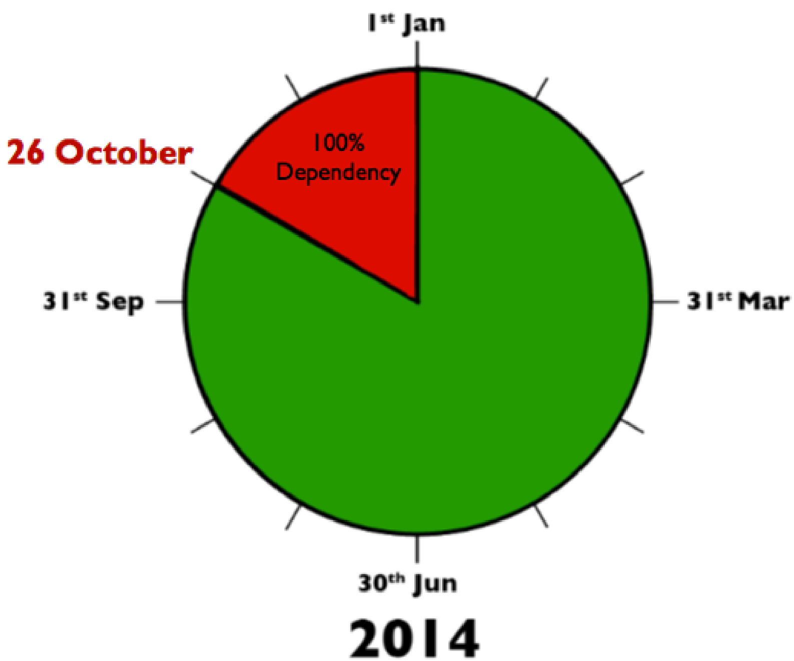
40% Savings in Overall Demand

Imagine: Capture These Savings



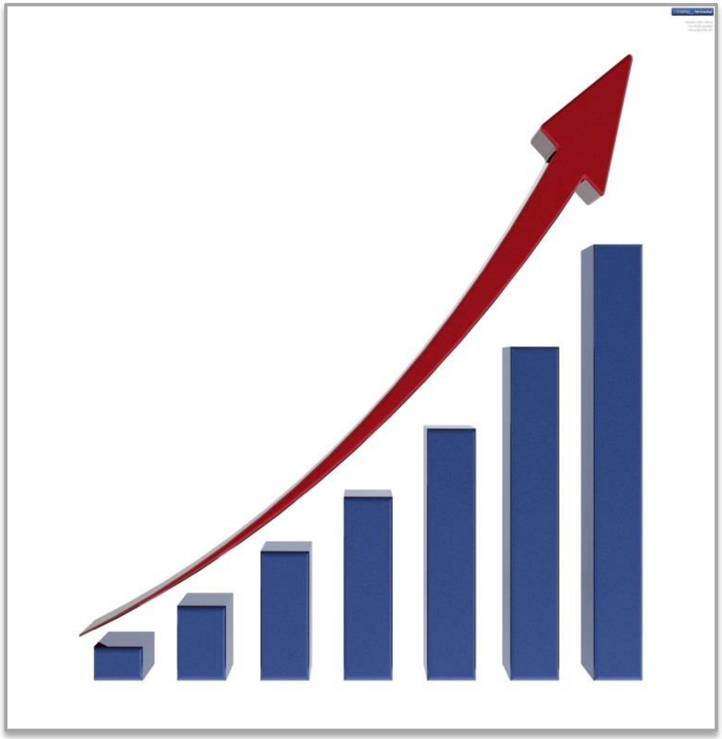
European Energy Dependence Day Pushed Back!

<u>€335 billion</u> in reduced expenditure compared to 2011

Impact of 40% Target in 2030

Increased Greenhouse Gas Emission Reductions
Range 49% to 61%

Increased Share of Renewables
Range 35% to 48%



Binding Sectoral Target for Buildings

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New Direct Local Jobs: 2 million

Local, permanent jobs in Construction; this leads to over 6 million total new jobs.

Public Finances: €39bn per year

Boost to Public Finances in 2020. Rising to €78bn per year by 2030.

Boost to EU GDP: 0.7% per year

Estimate increase in construction output is in the range €670 to €830bn per year (from 2020).

Financing Energy Efficiency Measures

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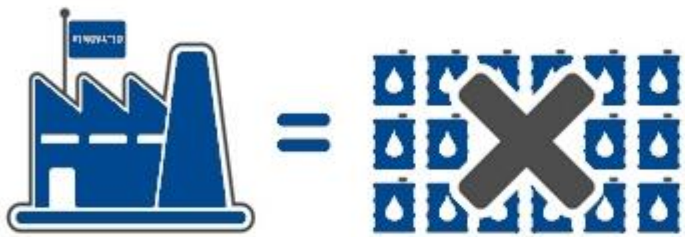
Interim Report April 2014
Energy Efficiency – The First Fuel for the EU Economy

Strong Regulatory Stability
Builds Confidence – Better More Complete Implementation and Enforcement

Energy Efficiency
Financial Institutions Group

Political Priority – Deep Renovation

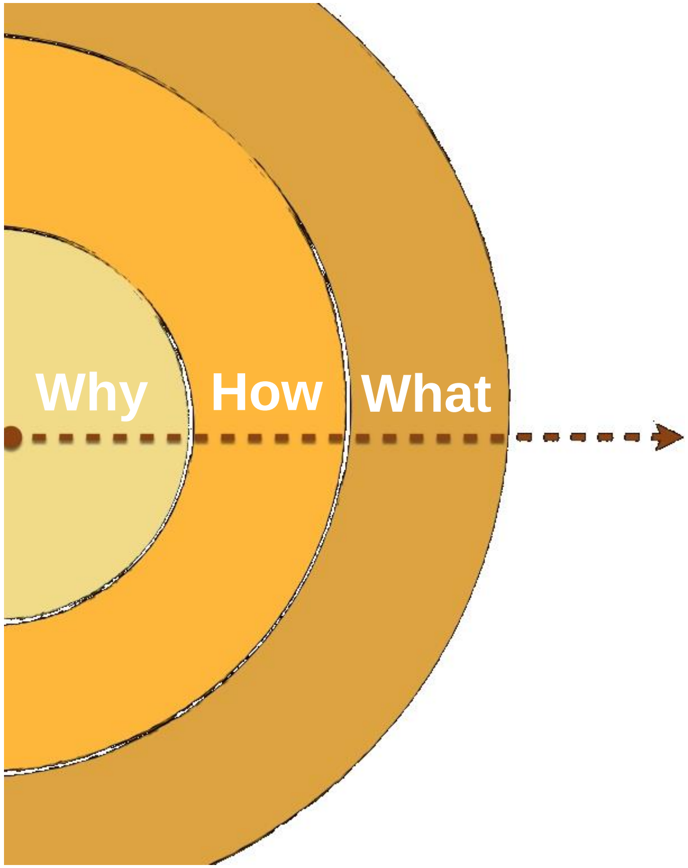


Reduced Energy Imports

Millions of Jobs

Billions in Financial Returns

Start with the Golden Circle



Think

Act

Communicate

Key Messages

Ambitious 2030 Targets
Binding EE Targets Overall and For Buildings

For 2030 Policy:
Energy Efficiency First

Implement EEFIG Recommendations

Deep Renovation – Political Priority
Reduce Imports, Create Jobs, Generate Revenue

Reassurance

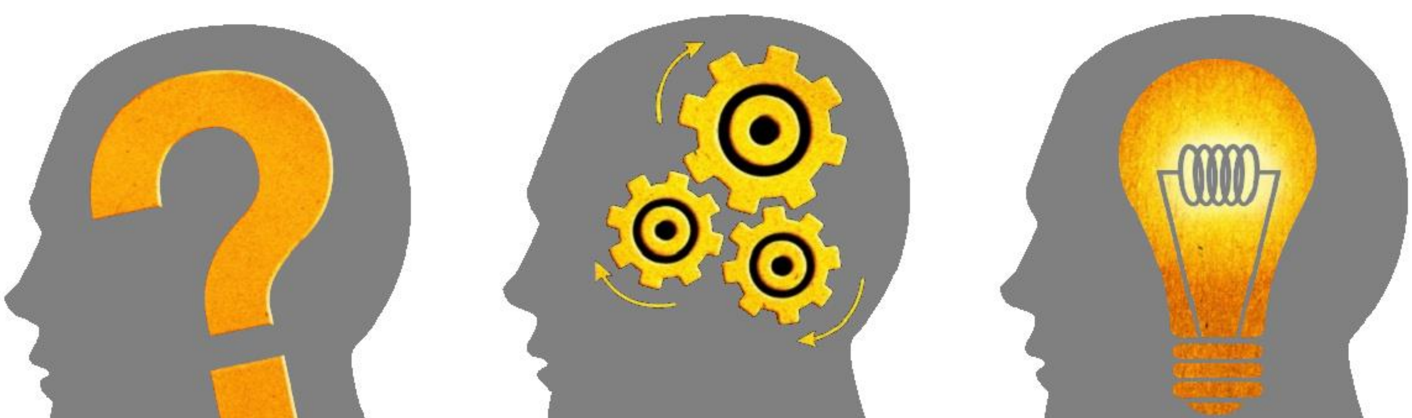
SOMEBODY

SOMEWHERE

SOLVED YOUR PROBLEMS

FOR DIFFERENT REASONS

IN DIFFERENT CIRCUMSTANCES



Start with the Golden Circle NOW

Don’t keep pushing the date from 2020 to 2030 . . . to 2040

Get the Golden Circle rolling now!

“True inspiration comes when we start with why”
Simon Sinek

Bron: http://www.slideshare.net/ohmgrrl/sinekexpand1

Thank you for your attention

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