

A LEADER IN PITCHED ROOF SOLUTIONS

Our company, our products, our solutions



COMPANY PROFILEA leader in pitched
roof solutions 3

Group key figures 4

Strong brands all
around the world 5

The whole roof is key 6

OUR OFFEROur products and
solutions 8

Concrete tiles 9

Clay tiles 10

Roofing components 12

Chimneys, stoves,
energy & ventilation
systems 13Service offer meets
customer needs 14**INNOVATION**Innovative products
and solutions 16

WrapTec 17

Aerlox 18

**RESEARCH &
DEVELOPMENT**Technical and industrial
know-how 19Product and systems
testing 20**PEOPLE &
HERITAGE**

Experienced people 22

A tradition in roof tiles,
components and
chimneys 23**GLOBAL
FOOTPRINT**

World-wide presence 25

Experts in local
building traditions 26

A LEADER IN PITCHED ROOF SOLUTIONS

We are a leading manufacturer and supplier of pitched roof products, including both roof tiles and roofing components, in Europe, parts of Asia and South Africa. The product portfolio is completed by ceramic and steel chimneys and energy systems.

- Decades of experience in pitched roof products
- Expertise covering all steps of the manufacturing process
- One of the few tile manufacturers to also produce and sell complementary roofing components
- Wide range of product & systems offering
- Skilled people with the dedication to deliver high quality products, systems and services

Group Organisation



Management Responsibilities



Senior Management Team



Georg Harrasser
CEO



Matthew Russell
CFO

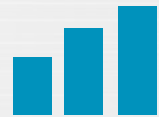
GROUP KEY FIGURES

Revenues 2016
(EUR million)



1,235.8

Operating EBITDA 2016
(EUR million)



194.1

Net profit 2016
(EUR million)



12.5

Employees
(Dec 2016)



7,922



Business operations in **36 countries**
worldwide, Group Holding in Luxembourg

More than **120** plants



Detailed information

STRONG BRANDS ALL AROUND THE WORLD

Our customers benefit from our outstanding expertise, our broad product range and strong brands in local markets. We are represented all over the world – we are where you are.

- Proximity to our customers – installers, merchants, architects and home owners
- Strong, long-term customer relationships
- Experienced local sales force
- Expertise in local building traditions
- Well-established plant network to provide expertise



Western Europe,
Nordics & Baltics,
Italy, Asia



Central &
Eastern Europe,
Southern Europe



South-Eastern
Europe



United Kingdom



South Africa



Spain, Portugal



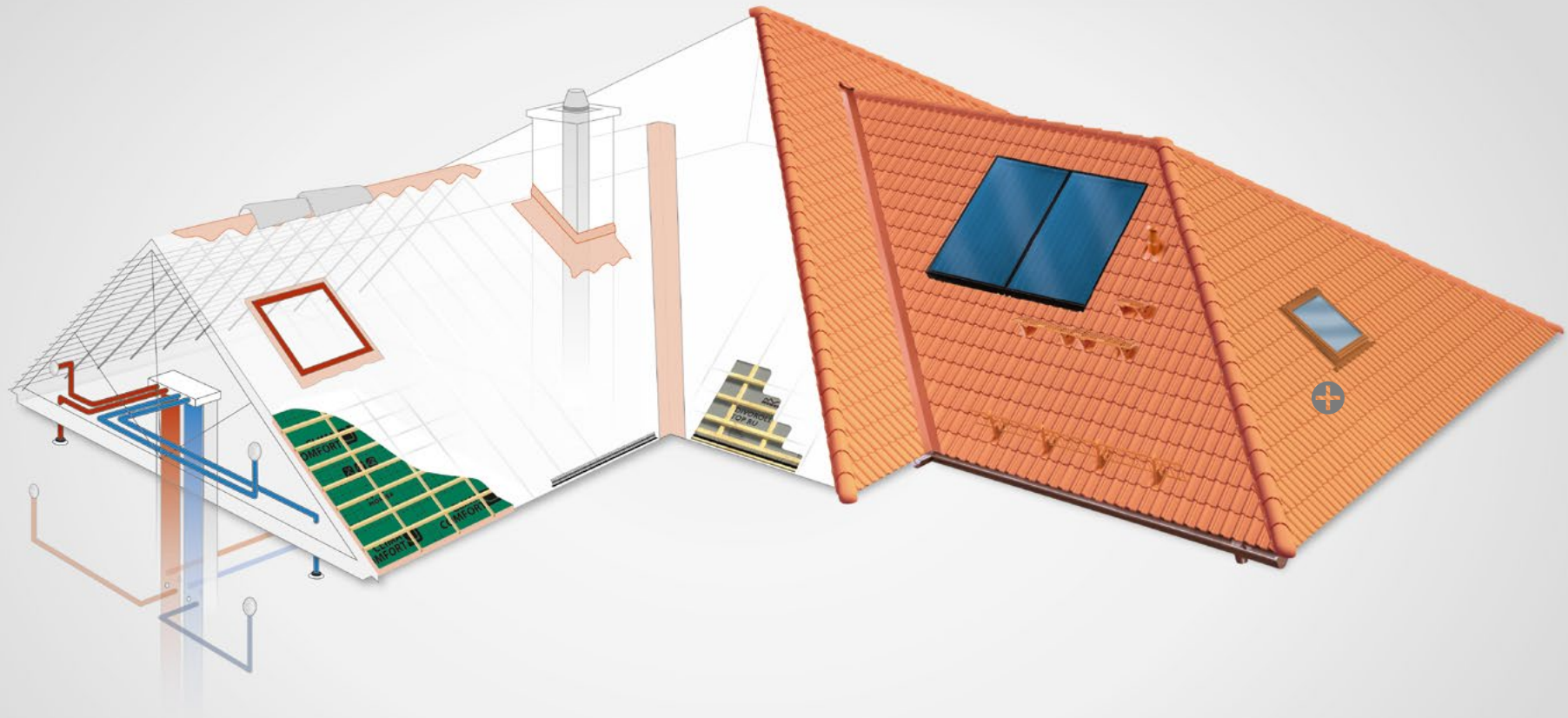
Italy



Europe

THE WHOLE ROOF IS KEY

A modern roof needs to do more than just keep the water out and a full roof system is more than the sum of its parts. The advantages of tiles, individual components and both integrated heating and ventilation systems add up to a more extensive benefit.



Natural Need

Protection and Comfort

Pitched roof tiles have a long tradition in Europe. Clay tiles have been used for millennia, concrete tiles for several hundred years. The basic functionality of tiles has not changed much since then: protecting the building from the elements in an aesthetic way.

OUR PRODUCTS AND SOLUTIONS MAKE THE DIFFERENCE

We offer a vast range of products that help our customers add functionality to the roof and the entire building.

Roof Tiles

Concrete tiles



Clay tiles



Roofing Components

Underlays



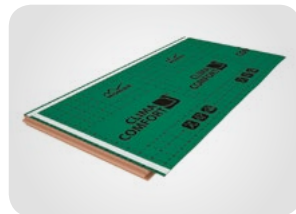
Accessories



Ridge & Hip/abutments



Insulation



Roof outlets



Solar roof systems



Chimneys & Energy Systems

Ceramic and steel chimneys



Energy and ventilation systems



CONCRETE TILES – A MODERN BUILDING MATERIAL

Concrete tiles represent a roof solution which is highly functional, ecologically sound and also excellent value for money.

Today concrete is an indispensable building material for the construction of modern buildings and a firm part of the appearance of our cities. On the roof as well, where concrete tiles provide protection against wind and weather.

- Made from sand, water, cement and pigments
- Energy-efficient production process
- Superior longevity – strength increases over the years
- Long product life cycle – ecologically sound roof solution
- Excellent value for money
- Variety of designs, perfectly fitting the different architectural styles
- Innovative surfaces for a smooth texture and stay-clean effects

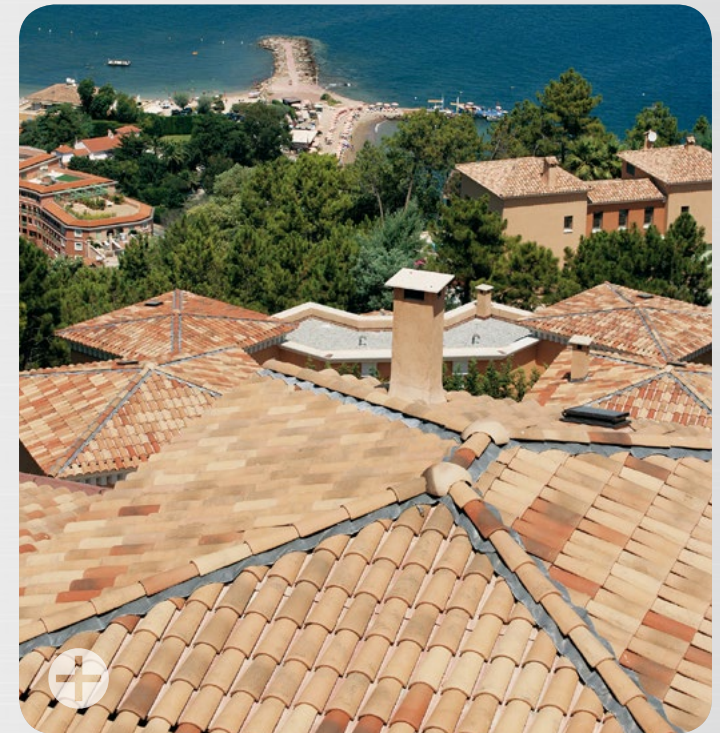


Concrete tile production process

CLAY TILES – A TRADITIONAL BUILDING MATERIAL

Clay is one of the world's oldest raw materials and clay tiles remain a contemporary building material to this day.

- Clay usually sourced from local/regional areas
- High-tech production processes
- Modern profiles support architectural trends and new building styles
- Classic profile designs made for renovation projects and traditional architecture
- Natural surface textures for a touch of warmth and a handmade look



Clay tile production process

Complex Systems



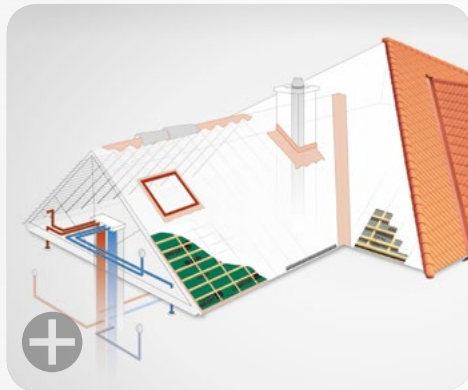
Detailed Solutions

Roofing has developed into a sophisticated business. With ever rising demand for energy efficient building envelopes and stricter national and super-national regulations, the appreciation of the modern roof as a holistic system has increased, making a full range of additional components essential.

ROOFING COMPONENTS – PERFECTLY MATCHING OUR TILES

**We do not only sell a large variety of roofing components – we also manufacture them.
With 6 plants in Germany, Denmark, Estonia and Malaysia, we are a global player in this business.**

With the appropriate roofing accessories, our roofs transform into complete roof systems, adding functionality, quality, security and an attractive appearance to the roof.



Components portfolio



DuroVent



**Photovoltaic tiles/
Solar thermal systems**

CHIMNEYS, STOVES, ENERGY & VENTILATION SYSTEMS

Energy-efficient heating harbours the highest energy savings potential for private households and contributes significantly towards the protection of natural resources and the environment.

The chimney – part of the heating system – is as decisive for the construction of modern building shells as are ventilation solutions. With optimum solutions and highest quality standards, our subsidiary Schiedel – market leader

of chimney systems in Europe – provides ideal products for a comfortable indoor climate that ensures well-being and minimises resource consumption and costs.

Schiedel website



Ceramic & steel chimneys



Energy & ventilation systems



Stoves

SERVICE OFFER MEETS CUSTOMER NEEDS

Our comprehensive range of products is completed by a variety of services aimed at creating long-lasting value for our business partners.

We foster an open dialogue with all our customer groups: In customer advisory boards, through trainings and lectures to qualify installers, on trade fairs to

present innovations, through consultancy when the customer needs advice, or simply by giving sales support at the Point of Sale to better serve our customers' needs.



Trainings

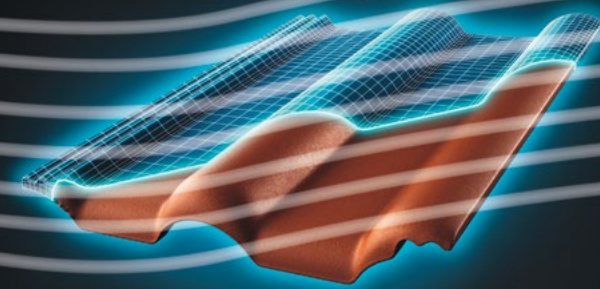


Customer services



Guarantees and financing

Sophisticated Research & Development



Setting Standards

As a premium supplier, Braas Monier has always striven to be at the forefront of developments and to shape future markets. Our unrivaled Research & Development facilities provide us with deep material and product know-how, enabling us to constantly innovate in products and roofing systems.

INNOVATIVE PRODUCTS AND SOLUTIONS

At Braas Monier, we continuously develop pioneering innovations, driven by demand – and of course a sense of curiosity.

We monitor trends and changes not just within our industry to further develop our existing products and their functional performance as well as new products, materials and systems.

Over 900 patents – applied or granted – give proof of our innovative capacity in translating customer needs into a value adding offering.



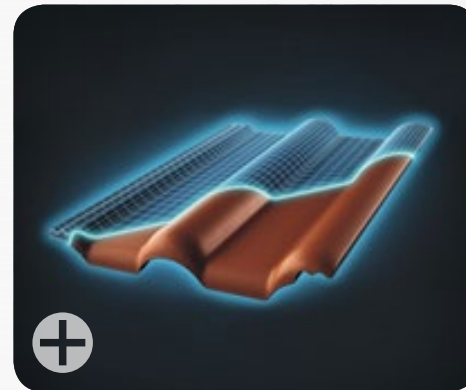
Low Pitch roofing system



Absolut Xpert



InnoFix tile clip



Protegon



Energy saving roof tiles

Explore lifeHEROTILE

WRAPTEC: SELF-WELDING MATERIAL FOR 100% WATERTIGHT SEALING

WrapTec is our new, innovative jacketing material for typically insulated heating, ventilation and air conditioning (HVAC) systems, based on our abutment technology, a lead-free, flexible and adhesive flashing.

Owing to WrapTec's unique self-welding properties, processors are now able to create 100% watertight installations very fast, thus saving time and notably cutting down on labour costs.

- Up to 50% time and cost savings at installation
- Watertight, self-welding jacketing material
- UV resistant and weatherproof
- 100% recyclable
- Simplified storage and transport (rolls)
- Carbon footprint more environmentally friendly than that of aluminium claddings

Product flyer

Website

AERLOX: LIGHT · STRONG · FAST – THE NEXT GENERATION OF CONCRETE TILES

Concrete tiles with Aerlox technology are a new type of light weight tile with a highly advanced recipe and physical structure that allow it to weigh 40% less per m² than a standard concrete tile whilst retaining all important advantages.

Concrete tiles with Aerlox technology

- are suitable for weaker roof structures
- are easy to carry and install for roofers thus saving time and physical effort
- increase economically feasible transportation radius
- deliver better summer comfort and soundproofing than other light weight materials
- give the home owner an attractive looking roof
- are as robust, frost resistant and long-lasting as a standard concrete tile
- but still weigh up to 40% less than standard concrete tiles



TECHNICAL AND INDUSTRIAL KNOW-HOW – EXPERTS AT WORK

We devote a multitude of resources to research, product development, product and systems testing and process engineering.

A dedicated in-house team of product designers, material scientists, and engineers work closely with equipment manufacturers and external specialists to develop new and improved products and to constantly improve our plants' performance. This is done in close co-operation with the local industrial communities and the Factory Excellence team in our headquarter.



Our Technical Centre



Product development



Factory Excellence

SETTING STANDARDS WITH OUR PRODUCT AND SYSTEMS TESTING

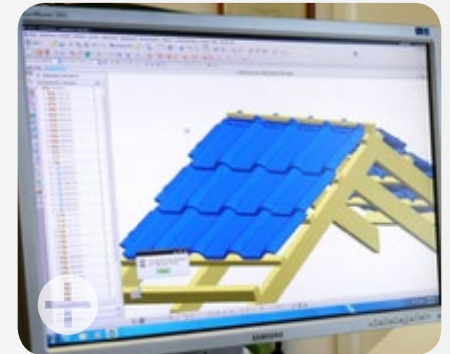
Excellent performance and ease of use on the roof are vital to the success of our roof systems. Our test facilities allow us to analyse the performance of our products under all climatic conditions to make them as functional, durable and attractive as possible.



Freeze-thaw resistance



Wind tunnel



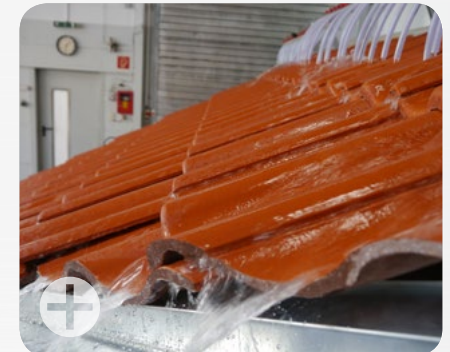
Roof physics



Weathering resistance



Sunlight resistance



Acid rain resistance

Preserving Value



Decades of Experience

Preserving value by realising the full potential of a modern roof poses a challenge for home owners. Our comprehensive understanding of the whole roof makes us a premium partner.

EXPERIENCED PEOPLE

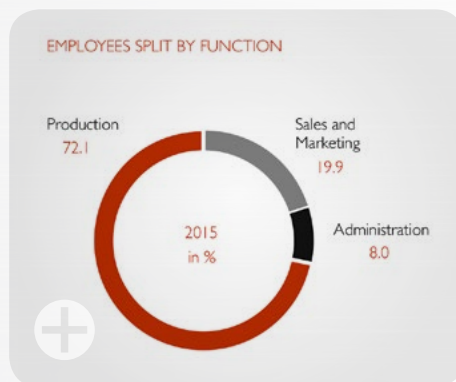
At Braas Monier, more than 7,700 employees in 37 countries across the world are dedicated to delivering high quality products, best services and innovation.

They are focused on satisfying our customers, be it professional business partners like roofers, architects, merchants or specifiers or ultimately the family who lives under a roof.

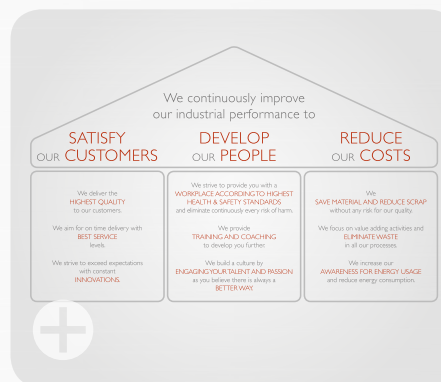
- Detailed understanding of our local markets
- Extensive experience of our local people in production, marketing, sales and service

- Supported by international experts from all areas to foster good practices and innovation around the globe
- Cross-functional and cross-border teams for specific projects in place

Website – working at Braas Monier



Employees split by function



Factory Excellence Programme

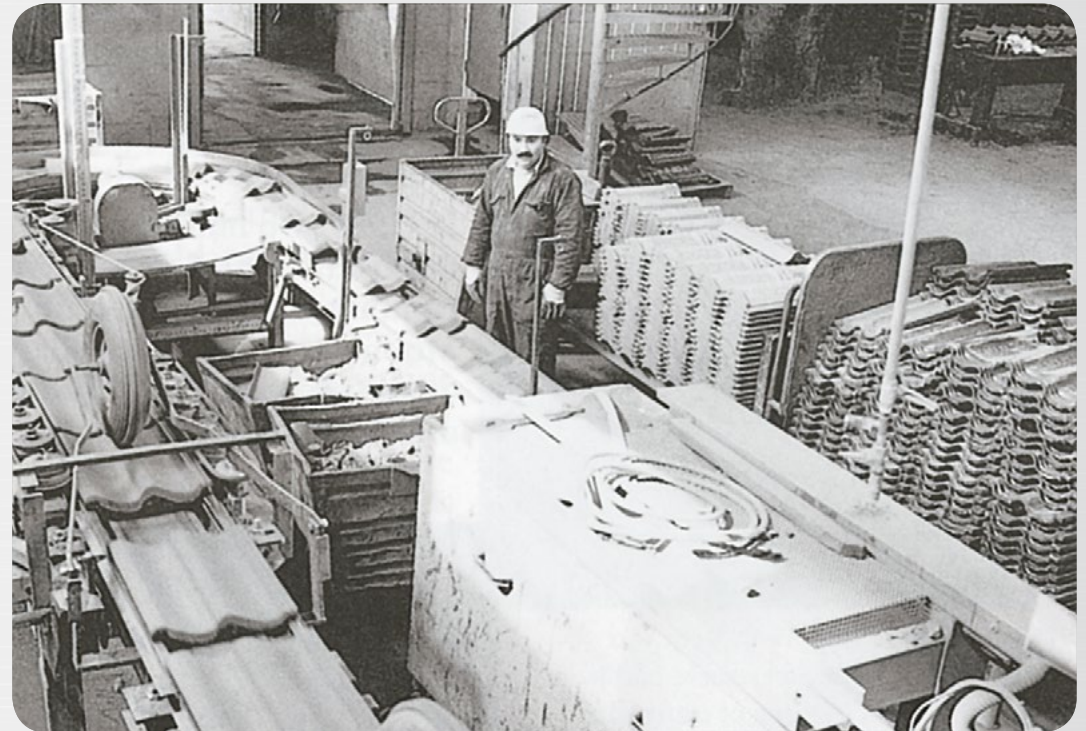


Employee testimonial

A TRADITION IN ROOF TILES, COMPONENTS AND CHIMNEYS

We have been making pitched roof products for almost a century, forging strong long-term relationships with our customers. And we have been the leading chimney specialist in Europe since decades.

- Decades of experience in our markets
- Well established, trusted and successful brands
- A wide range of roofing products for literally all roofing projects and local requirements
- A broad offering of chimneys and energy systems grown over decades
- Manufacturing expertise covers all steps of the manufacturing process and can be found around the globe
- Longstanding relationship with our business partners



Global Footprint

Local Business



With more than 100 plants in almost 30 countries, Braas Monier has a well established plant network allowing it to successfully serve individual customer needs in mature European markets as well as in emerging markets in Asia and Africa.

WORLD-WIDE PRESENCE

With more than 100 production sites and business operations in 37 countries Braas Monier is always close to its customers world-wide.



EXPERTS IN LOCAL BUILDING TRADITIONS

Regional preferences play a major role in roof tile aesthetics. Expertise in local building traditions requires direct proximity: Our customers benefit from the fact that we are represented all over the world – we are where you are.



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