

CAPITAL
MARKETS
DAY **POWERING
AHEAD**


umicore
materials for a better life

Seoul, Korea

6 June 2018



Closing remarks



SPEAKER

Marc Grynberg

Chief Executive Officer



Unique position in clean mobility

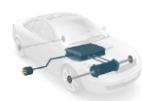
Our 2015 analysis is unchanged



Automotive catalysts



Battery materials



Fuel cell catalysts



Recycling services



Incumbent



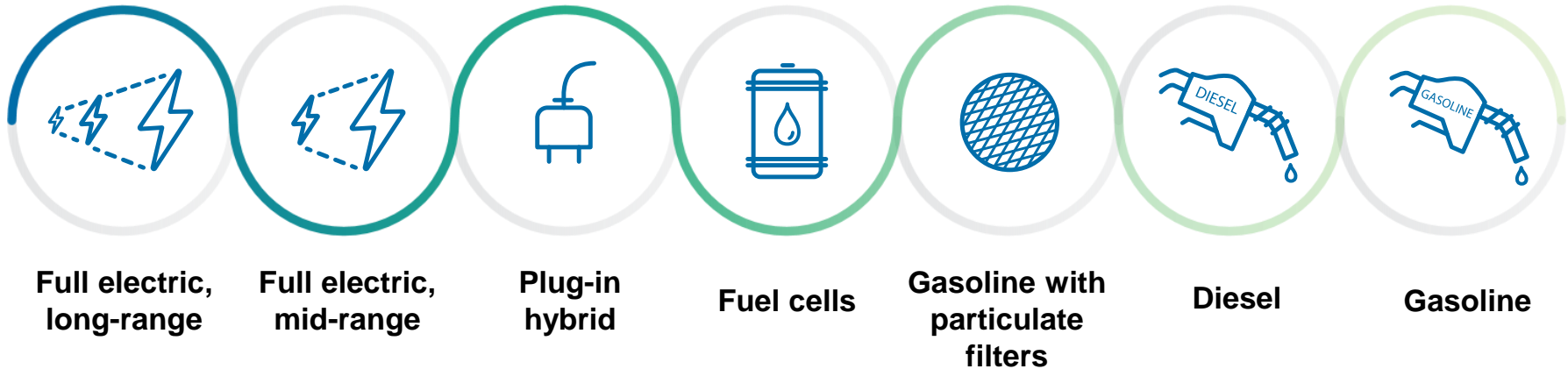
Early stage

	Automotive catalysts	Battery materials	Fuel cell catalysts	Recycling services
Umicore	✓ ✓ ✓	✓ ✓ ✓	✓	✓ ✓ ✓
Automotive catalyst competitors	✓ ✓ ✓	✓	✓	✓ <small>(incumbent in spent automotive catalysts)</small>
Battery material competitors		✓ ✓ ✓	✓	
Fuel cell catalyst competitors	✓ ✓ ✓		✓	✓

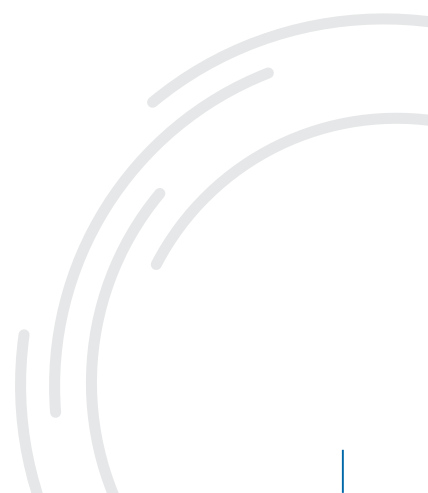
The certainty is diversity

Technological flexibility the only answer to mixed challenges

UMICORE IS NOT AGNOSTIC IN TERMS OF VALUE AND TECHNOLOGY



Catalysis or Battery Materials ?



Catalysis and Battery Materials

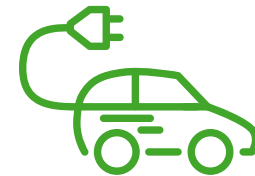
Not one or the other... BOTH

Unprecedented growth **driven by ever-tougher legislation**



Diversified technology needed to answer **the differing strategies of the OEMs**

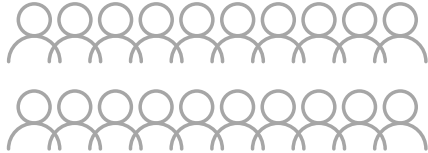
Umicore is uniquely positioned to thrive in both areas



Capital Market Day attendance

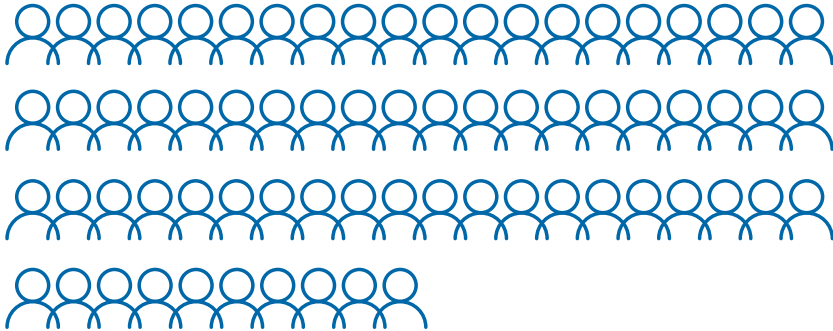


Korea 2012



20

Korea 2018



70



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