



Global Color, Additives, and Inks

John V. Van Hulle



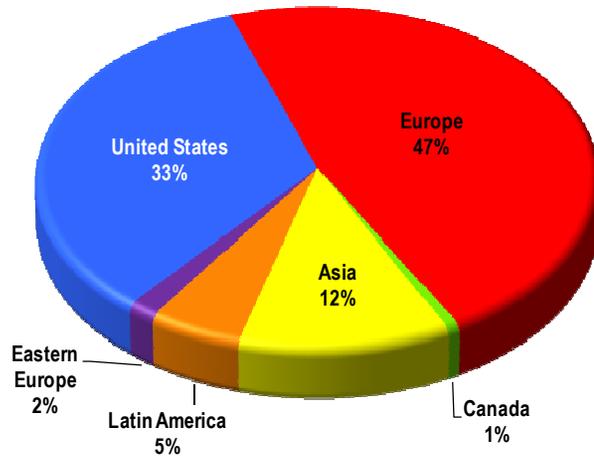
Collaboration. Innovation. Excellence.

At a Glance

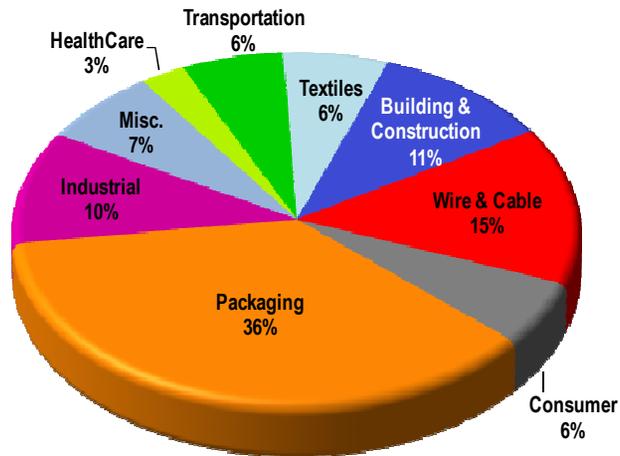
Global Color, Additives, and Inks



2011 Revenue: \$0.7 Billion*



2011 Revenue by Industry Segment*



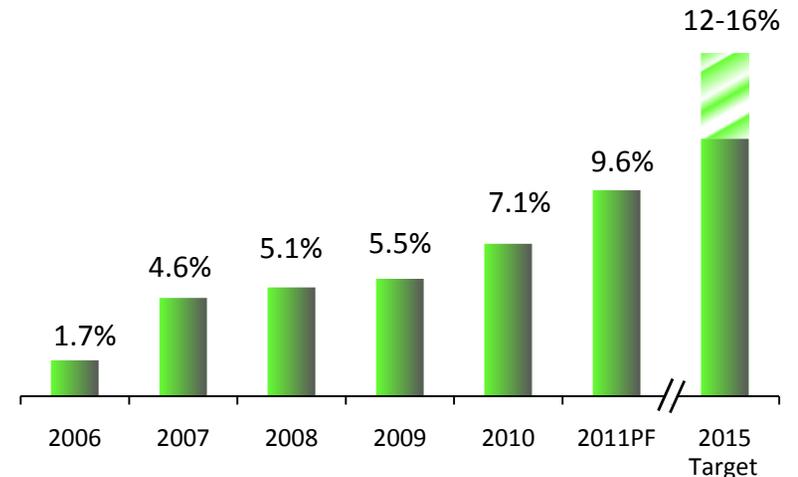
*Pro forma for the acquisition of ColorMatrix

Solutions



Expanding Profits

Operating Income % of Sales



Value Proposition

- GCAI is a global leader enabling OEMs and converters to profitably expand their business with customized color and additive solutions

Transformation Highlights

- Mix improvement and value-based selling has driven nearly 800 basis points increase in operating margin since 2006
- 2011 acquisition of ColorMatrix accelerates innovation pipeline and expansion into new markets

> \$12B Addressable Market

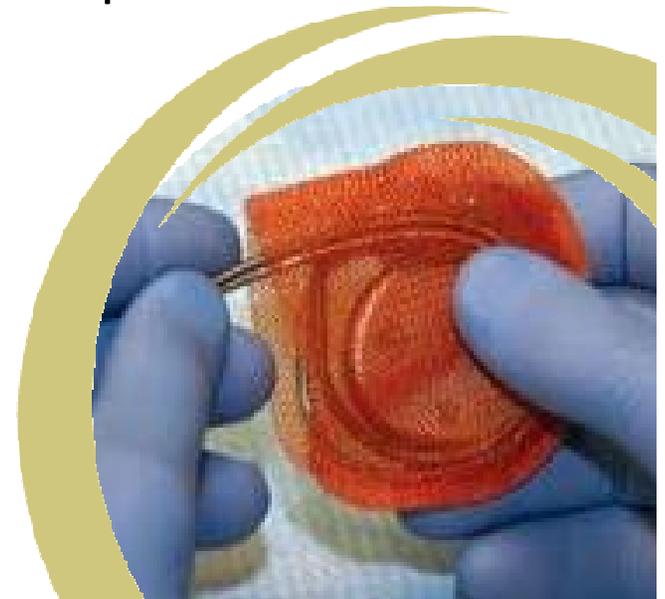


Key Differentiators

Global Color, Additives, and Inks



- **Unbiased, solution-based culture selling value**
 - ✓ Customer-centric approach
 - ✓ Economic value impact documented for customers
- **Complete package, product range and service offering**
 - ✓ Custom solutions for customers' unique requirements
 - ✓ Industry-leading service offering
- **Coordinated global infrastructure**
 - ✓ Consistency in product and customer service
 - ✓ Supply-chain reliability



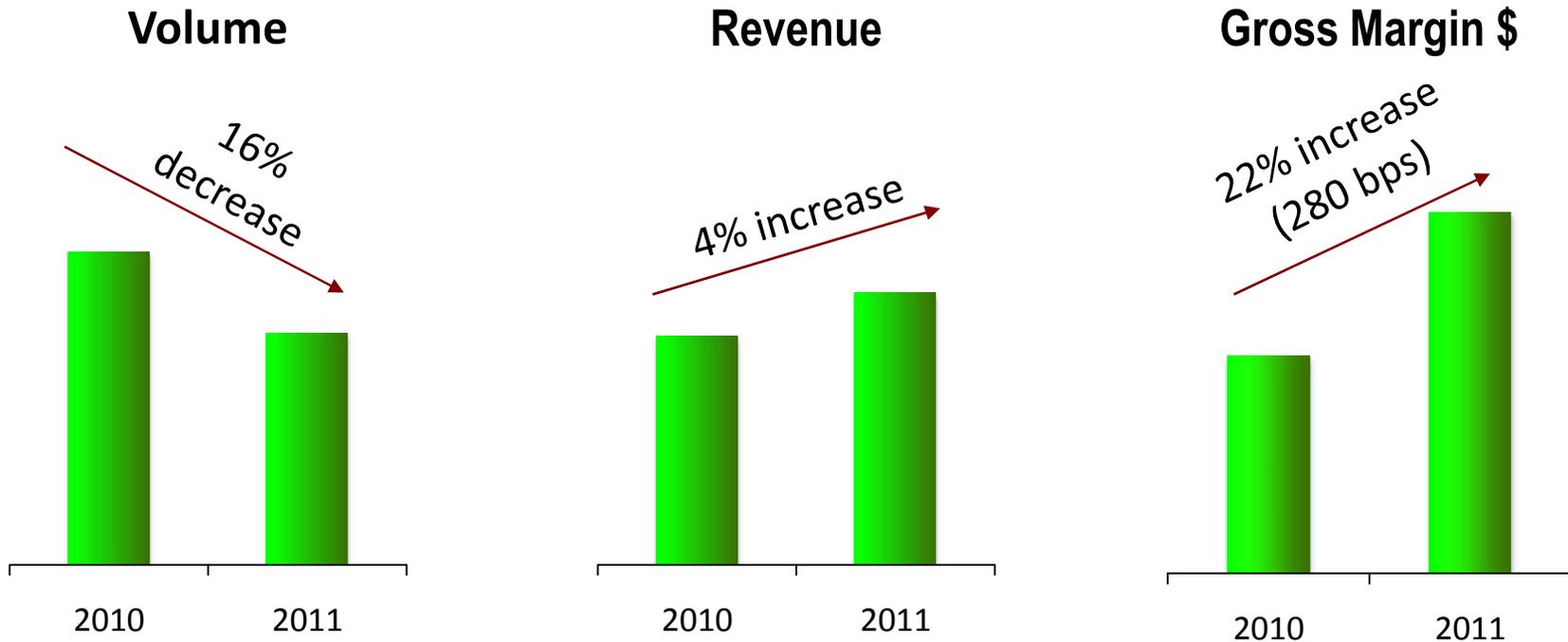
Global Film Customer

From Volume

Commodity white dominated mix

To Value

Focus on specialty color



Global Packaging Customer

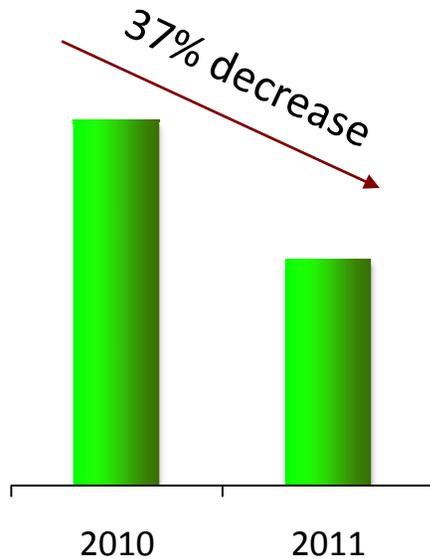
From Volume

Commodity white dominated mix

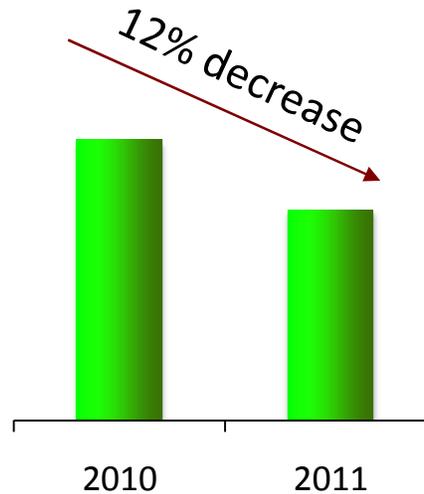
To Value

Focus on specialty color

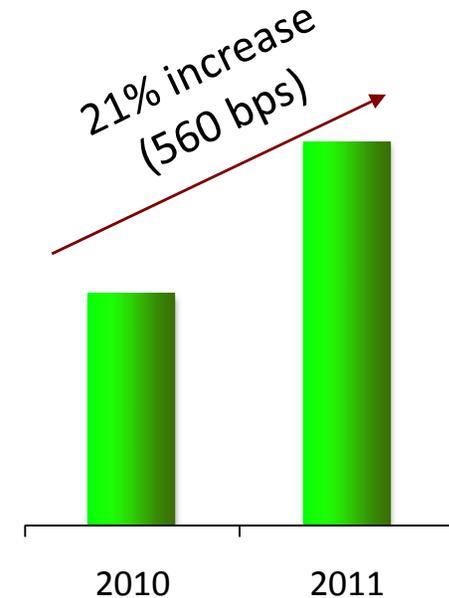
Volume



Sales



Gross Margin \$



Key Innovations

Global Color, Additives, and Inks



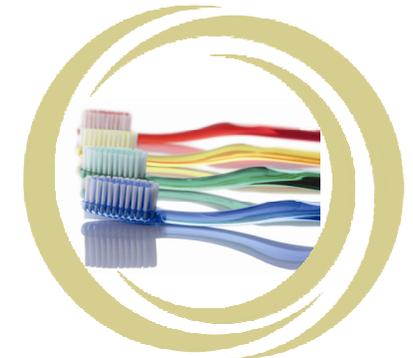
- **OnColor™ HC Plus**

- ✓ **Applications:** Medical devices
- ✓ **Customer benefits:** Brand enhancement, expanded market opportunities, speed-to-market



- **WithStand™ Antimicrobial Solutions**

- ✓ **Applications:** Healthcare devices, appliances, kitchen utensils and surfaces, children's toys
- ✓ **Customer benefits:** Expanded market opportunities, extended product life



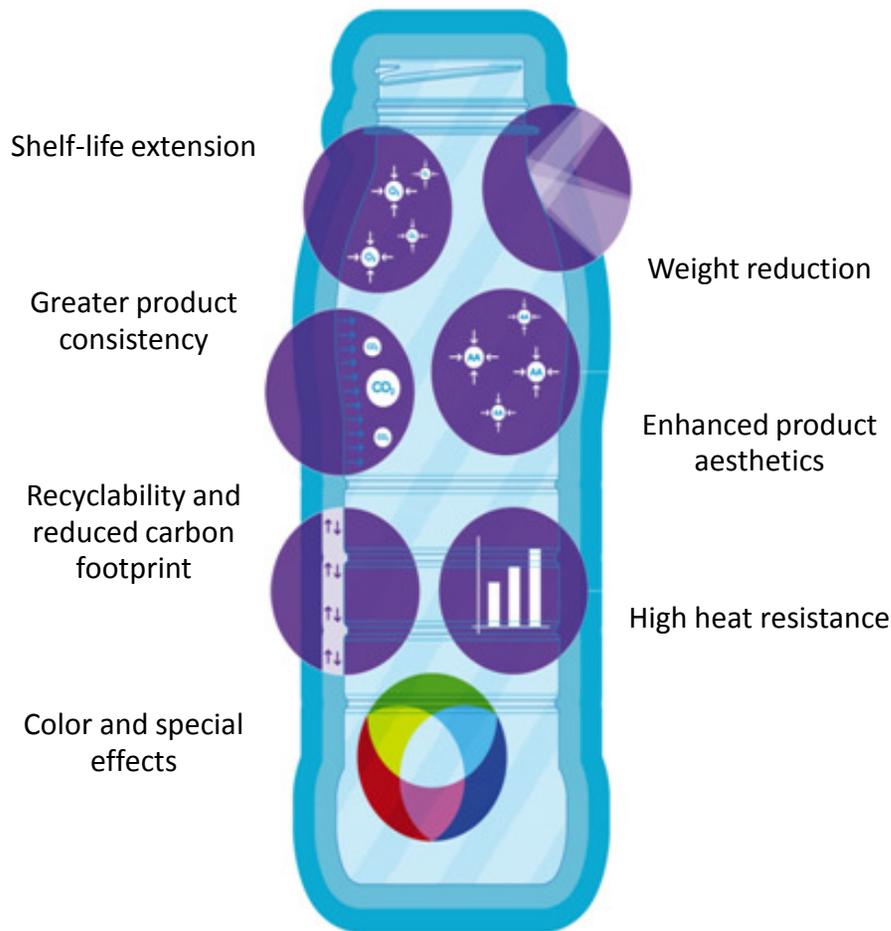
- **OnCap™ Antifog**

- ✓ **Applications:** Food packaging
- ✓ **Customer benefits:** Extended shelf life, improved product aesthetics, production efficiencies



Performance Additives

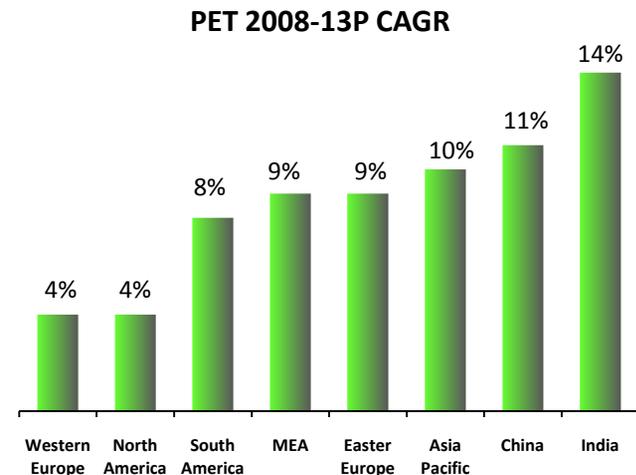
Global Color, Additives, and Inks



Market Opportunity

- **\$1.5 billion attractive, growing market**
- **Additives improve performance and reduce cost through light-weighting, reduced waste, faster cycle times, and extended shelf life of finished product**
- **Aligned with megatrend of protecting the environment**

Leading Global Supplier of Additives In Fast Growing PET Market



HyGuard™ Oxygen Barrier System

- **Applications:** Beverage containers, food packaging
- **Function:** Active scavenging system for oxygen-barrier improvement
- **Customer benefits:** Extended shelf-life, light-weight, recyclable



Excelite™ Foaming Agent

- **Applications:** Vinyl sheet for digital printing
- **Function:** Chemical foaming agent for weight reduction
- **Customer benefits:** Increased product quality, operational efficiencies



Joule RHB™ Advanced Reheat Technology

- **Applications:** PET containers
- **Function:** Infra-red absorber for improved reheating efficiency
- **Customer benefits:** Sustainability, operational and energy savings



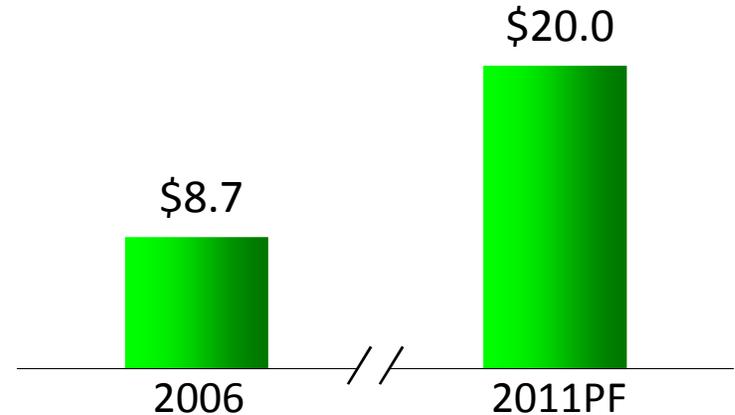
Areas of Focus

Global Color, Additives, and Inks

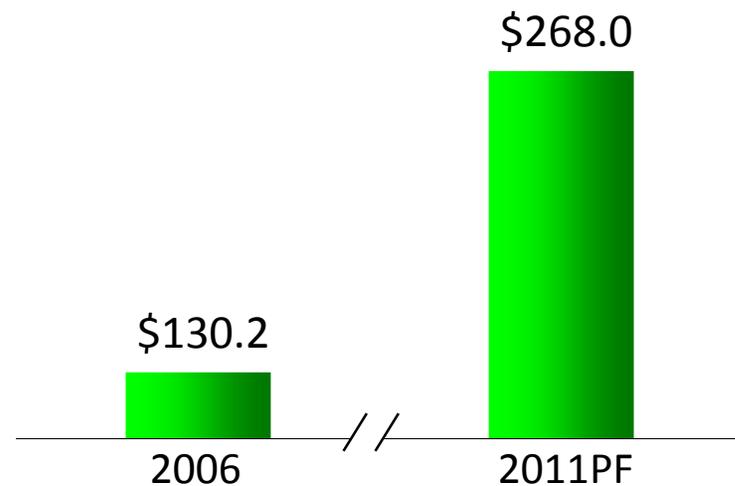


- Accelerate customer development pipeline with OnColor™ HC Plus
- Provide solutions addressing infection concerns in healthcare facilities
- Help customers expand into new markets with HyGuard™ technology
- Extend food shelf life and consumer appeal with OnCap™ Anti-Fog

Healthcare



Packaging



(Revenue in \$ millions)

Critical Imperatives and 2015 Goal

Global Color, Additives, and Inks



Critical Imperatives

- Integrate and leverage ColorMatrix technology and customer relationships
- Identify and focus on specialty applications within our target markets
- Accelerate global expansion and profitability improvements in emerging markets, leveraging success in U.S. and Europe

2015 Goal

- 12 - 16% return on sales



*PolyOne*TM

*Collaboration. Innovation. Excellence.*TM

