

4 April 2024

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EU PFAS RESTRICTION

Responsible innovation
advancing sustainability

Agenda

01

About Syensqo

02

Our fluorinated chemistry portfolio

03

Syensqo's roadmap to NFS technology

04

Towards technical zero manufacturing emissions

05

Emissions during use and EOL

06

Considerations on the proportionality of a ban



About Syensqo

SOLVAY

a resilient
market maker

✓
€5.6bn
2022 net sales

Soda Ash
& Derivatives

Peroxides

Silica

Coatis

Special Chem



SYENSQO

a market leader in
materials & consumers

✓
€7.9bn
2022 net sales

MATERIALS

Specialty Polymers

Composites

CONSUMER & RESOURCES

Novecare

Aroma

Technology Solutions

Oil and Gas Solutions

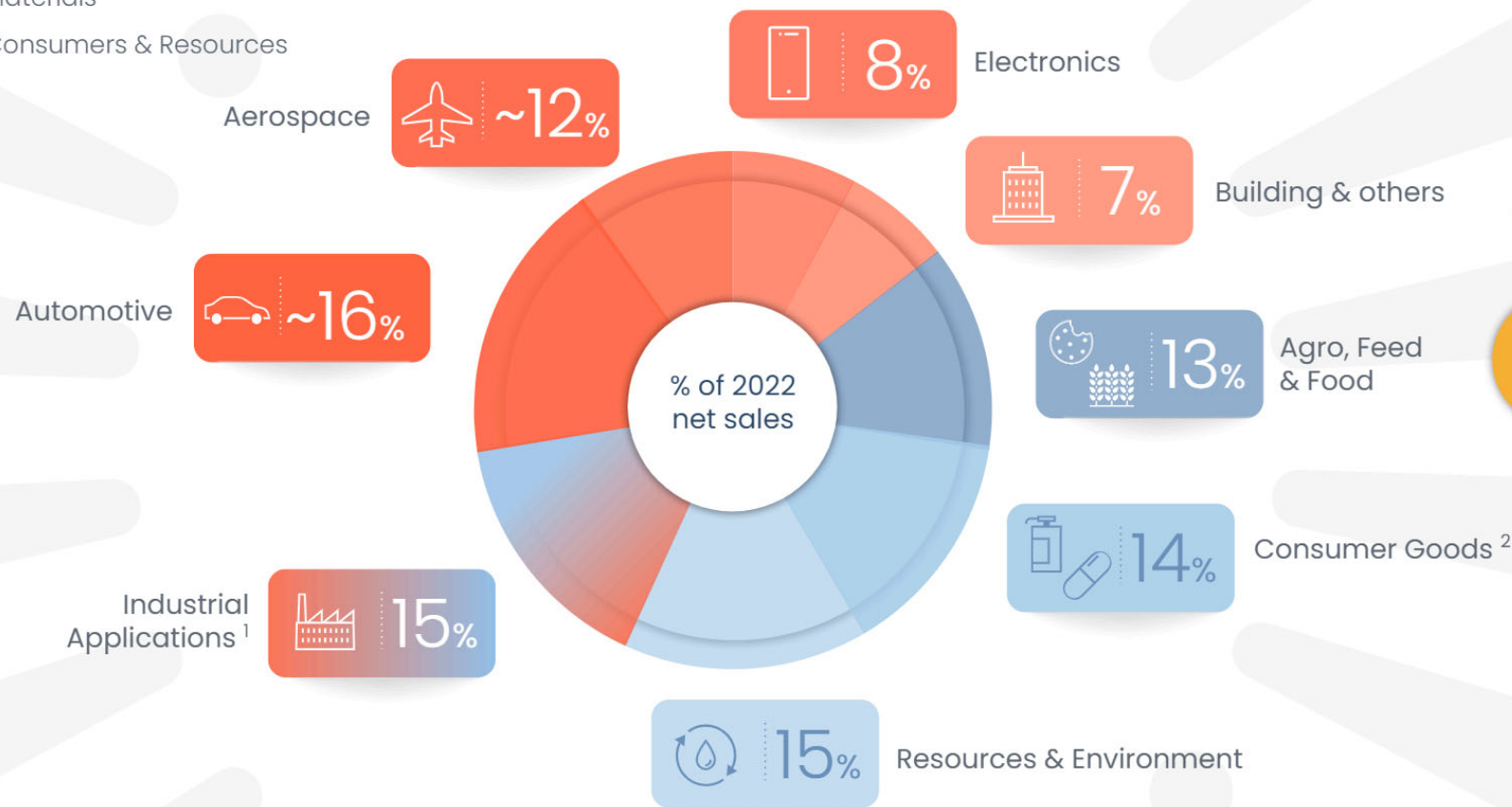


SYENSQO

Leadership in growth markets

Materials

Consumers & Resources



TOP 3
Market position*

5

Source: Management reports

1 Includes: Chemical Industry

2 Includes: Home, Personal & Health Care

*in ~90% of today's portfolio based on net sales



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We enable Lightweighting and Electrification

AUTOMOTIVE

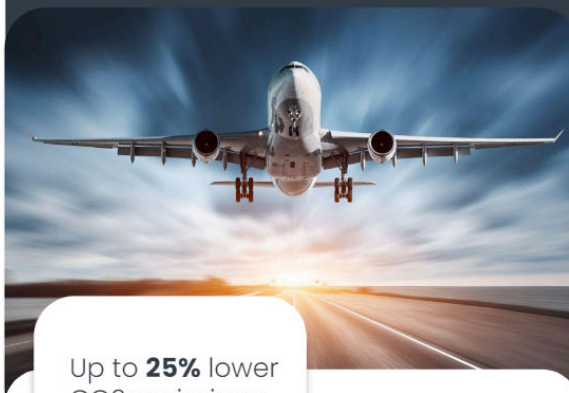
We are in
50%
of every EV/ hybrids



40% less weight versus steel in battery case
25% less weight of a car motor

AVIATION

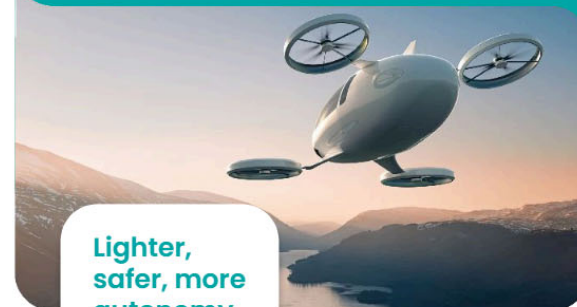
We are in **85%** of flying vehicles



Up to **25%** lower CO2 emissions
5 times stronger than Aluminum

AIR TAXI

Pioneer in developing
Advanced Air Mobility



Lighter, safer, more autonomy in next generation batteries



Syensqo in Europe

 **+6,100**
Employees

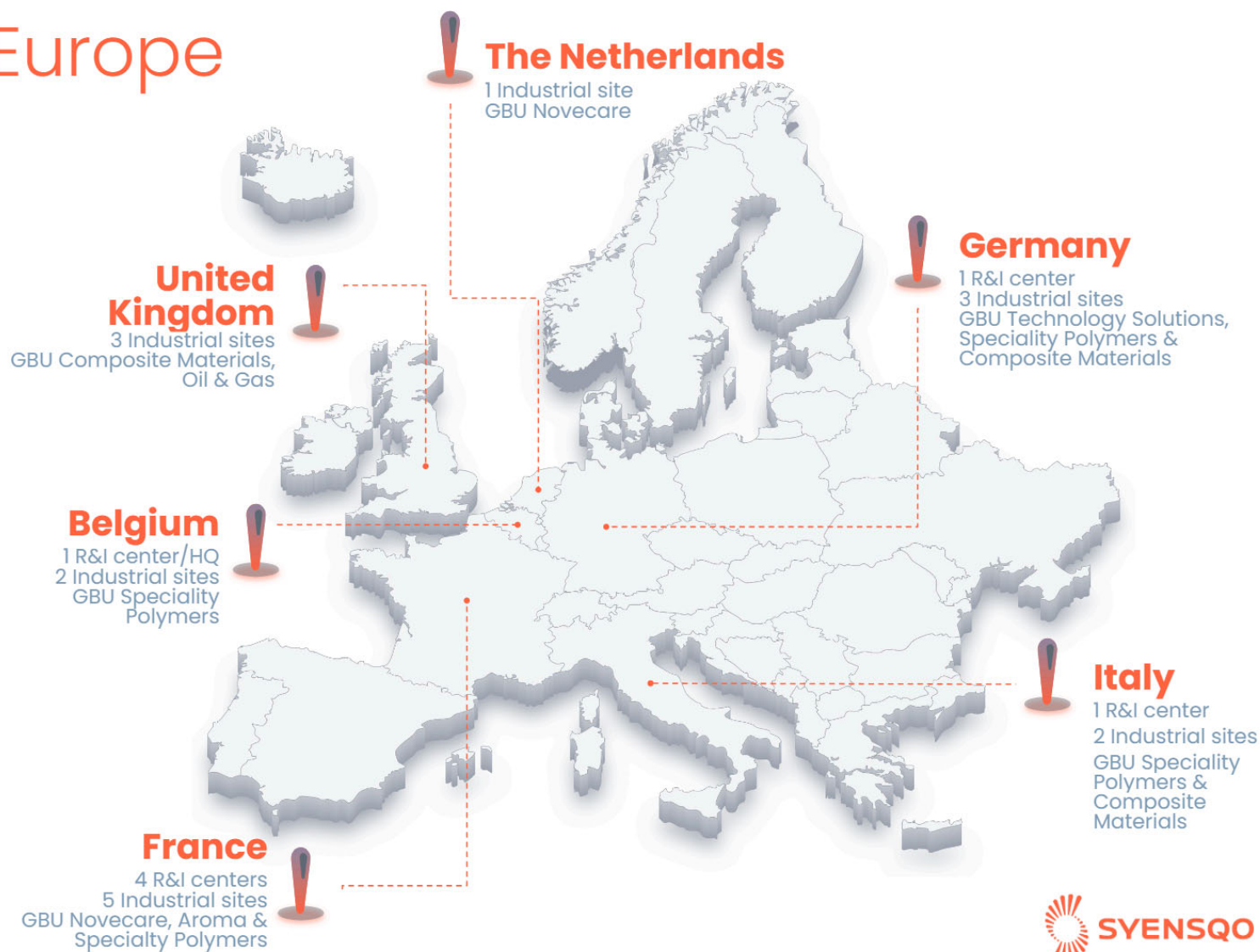
 **15**
Countries

 **HQ**
Brussels

 **7 R&I Centers**
RICB, RICL, RICP, LOF, RICK,
RICB

 **16 Plants**
GBU Novacare, GBU
Aroma, GBU Specialty
Polymers*, GBU
Composite Materials,
GBU Oil & Gas, GBU
Technology solutions

*For innovative applications in
transport, electronics, smart devices,
household and industrial appliances,
electronics, healthcare, environment
and construction electronics, buildings

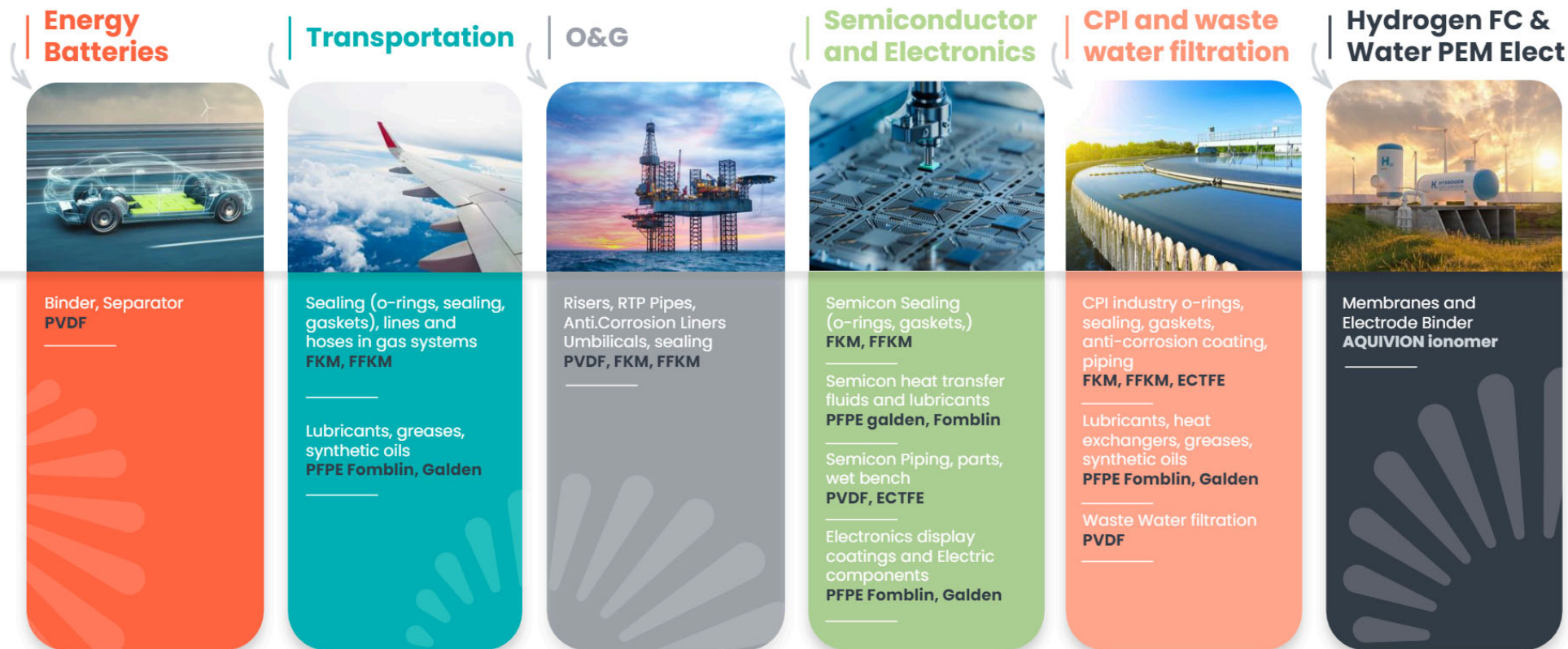


02



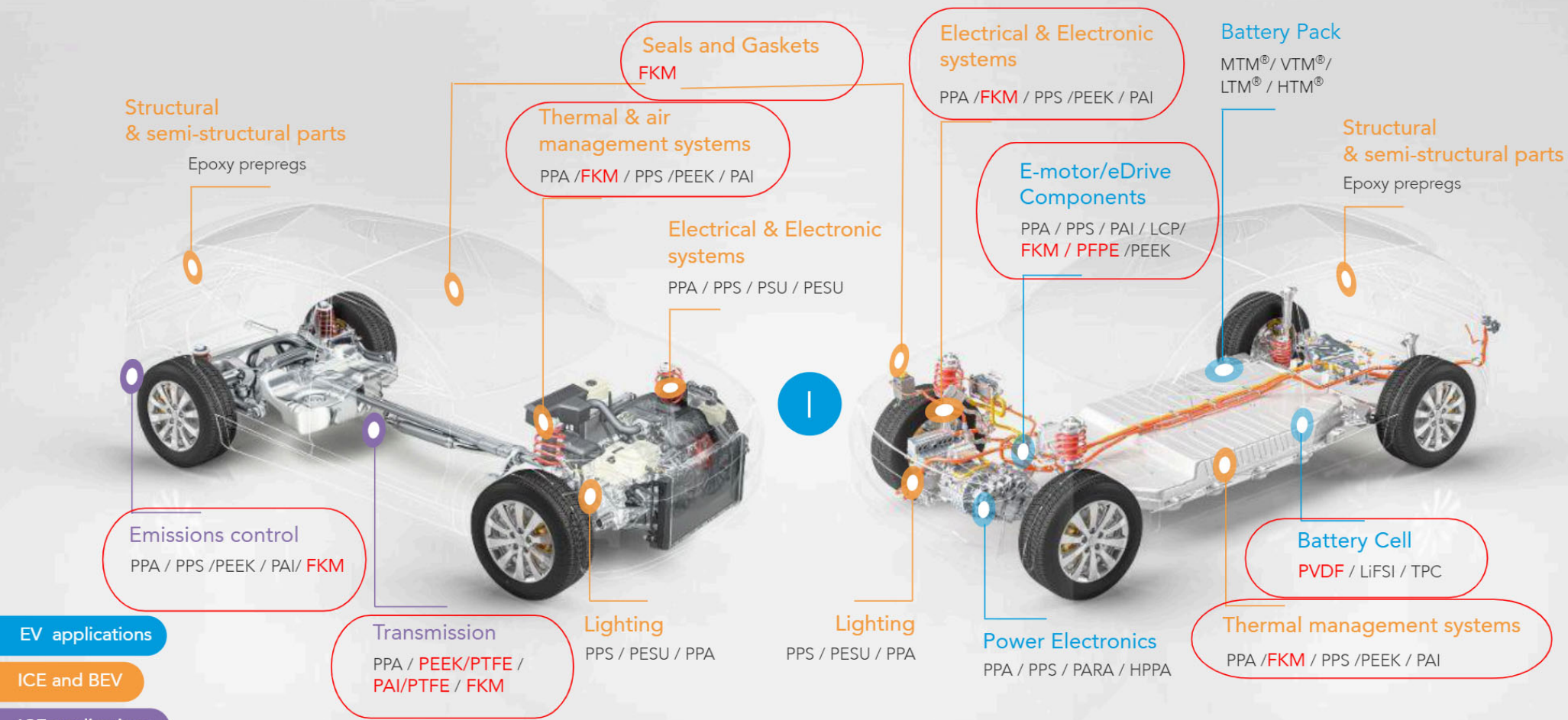
Our fluorinated
chemistry portfolio

What are our **fluoromaterials** and where are they used



Fluoropolymers in Vehicles

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EV applications
ICE and BEV
ICE applications

Battery Materials for cleaner mobility

Leading the way in sustainable batteries

❖ We are a leading provider of advanced materials and solutions for Lithium-ion and next generation batteries

- Our unique portfolio of technologies unlocks the full potential of battery cells
- Our polymers and composite materials help make the battery pack lighter, safer and more resistant
- We have invested in a pilot line in La Rochelle, France – the most advanced in Europe – to boost battery innovation.

❖ Committed to providing responsible solutions, leveraging our expertise in metal recovery to enable battery recycling – Partnership with Veolia



Customer centricity is top of mind

❖ Collaborative innovation through our dedicated transversal platform, bringing together all of Syensqo's technologies and expertise and providing one unique contact point for customers

- We are the “preferred partner” for a huge technological leap: developing the next generation of batteries by 2030, with the European Battery Alliance of major players across the entire value chain

❖ Global presence with R&I centers in Bollate (Italy), Aubervilliers (France) and Seoul (South Korea)



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More than **€400bn**

invested by OEMs in electrification over the next 10 years



Our portfolio addresses the key challenges of the battery industry: energy density; safety; cost; sustainability; and security of supply



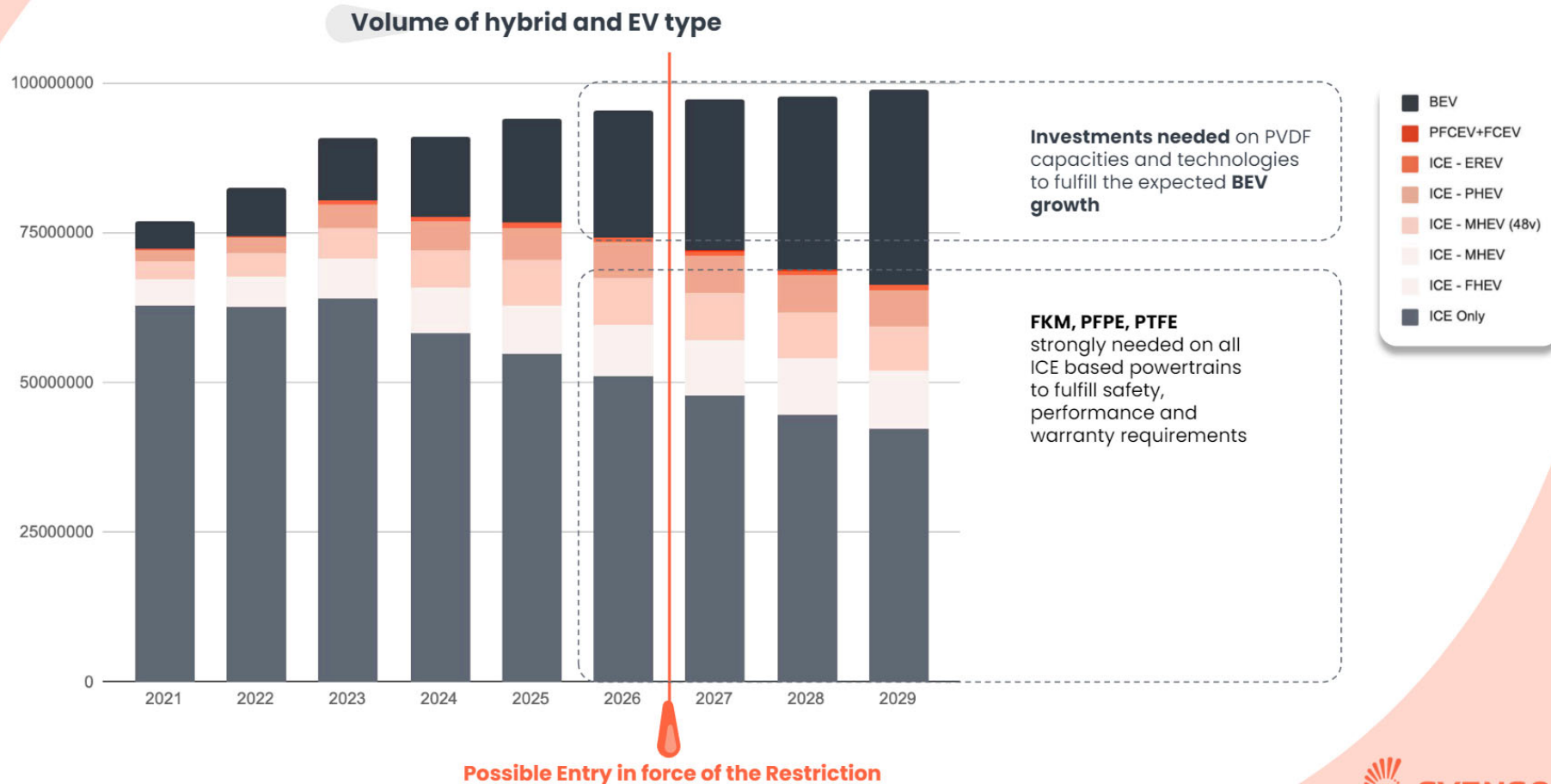
~40%

amount of electric vehicles in global production by 2030



Fluoropolymers in the Automotive Timeline

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Source: LMC Global Data (Q4 2023), Global Light Vehicle Powertrain Forecast (Syensqo own elaboration of data)

03



Syensqo's roadmap to NFS technology

04



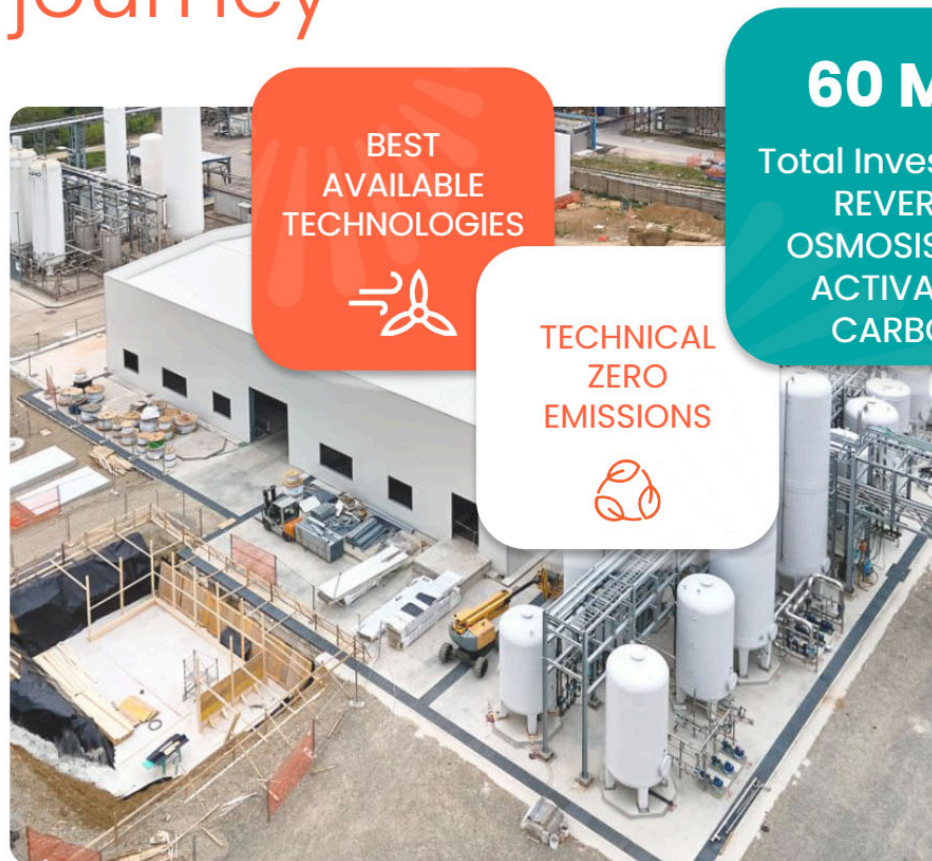
Towards technical zero manufacturing emissions



Spinetta Marengo

Responsible Manufacturing: an ongoing journey

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BEST
AVAILABLE
TECHNOLOGIES



TECHNICAL
ZERO
EMISSIONS



60 M€

Total Investment
REVERSE
OSMOSIS and
ACTIVATED
CARBON

- Phase out the use of Fluorosurfactants (completed at 80 % with commitment to reach nearly 100 % by 2026)
- Investment in state-of-the-art technologies
- Continuous improvement of emission treatment technologies to nearly 100% (technical zero)

WATER
EMISSIONS

Reduced by 50% every year, since 2018*
thanks to several investments



AIR
EMISSIONS

Fluorosurfactant PFAS emission of the plant
per year is comparable to hydrocarbons
emissions of **one single EUR6 car/y**



Spinetta Marengo, Italy



Tavaux



05

Emissions during use and EOL



Considerations on the proportionality of a ban

Downstream Users aligned on the importance of Fluoropolymers

Several industry associations asked for an exemption or a derogation for Fluorinated Polymers from the PFAS restriction due to their critical uses

“

We request that fluoropolymers (incl. fluoroelastomers and perfluoropolyether) are removed from the scope of the restriction”

*ACEA*

“

The ECHA PFAS restriction proposal is creating high uncertainty for the battery value chain industry and diverting forecasted growth and investment away from the EU.”

*RECHARGE*

“

A partial or no derogation outcome will result in a catastrophe for the EU economy and its citizens. The semiconductor industry needs a fully comprehensive derogation.”

*Semi.org*

“

Fluoropolymers and substances, such as monomers and processing aids, which are necessary for fluoropolymer manufacture and its production must be exempted from the ban”

*VDMA*

“

Regulatory action should focus on tackling any potential PFAS emissions at all life-stages and not on banning these essential, and low-concern substances. Fluoropolymer production and use shall be exempted from the overall PFAS restriction.”

*Hydrogen Europe*

Key Takeaways

Non-Fluorosurfactant technology (NFS): For Syensqo, the PFAS story is one of innovation: we are transitioning our products to phase out the use of fluorosurfactants – the PFAS substances under the most intense spotlight.

Responsible Manufacturing: phasing out Fluorosurfactants and using state of the art facilities aiming at “technical zero emissions”, is the concrete answer to concerns related the production process of PFAS.

Syensqo is accelerating the transition from **linear to a circular economy** by addressing the End of Life of its products through new recycling technologies in partnership with downstream users.



A large, solid orange circle is positioned on the left side of a white background. The circle is partially cut off by the left edge of the frame. The text "THANK YOU" is written in a white, sans-serif font across the upper portion of the orange circle.

THANK YOU