

PPG Industries
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Global Architectural Coatings Overview

PPG Industries, Inc.

May 15, 2014
Dallas, Texas






Forward Looking Statements

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Today's Timeline

6:30 – 7:00	Continental Breakfast	
7:00 – 7:05	Welcome / Presentation Overview	*V. Morales*
7:05 – 8:45	Global Architectural Coatings	*M. McGarry*
	Key Regional Summaries	
8:45 – 9:00	Break	
9:00 – 10:30	North America Architectural Coatings	*S. Sinetar* *T. Maziarz*
10:30 – 11:00	Lunch	
11:00 –	Market Walk / Transportation to Airport	

PPG SPEAKERS:

Michael McGarry
Executive Vice President



Scott Sinetar
Vice President
Architectural Coatings
North America



Tom Maziarz
Vice President,
Stores and Dealer,
Architectural Coatings
North America



PPG “Deep Dive” Program

- **Meeting Objective – Provide a deeper understanding of the various PPG businesses and coatings industry sub-segments in which we operate**



- **Typical Program**
  - End-use segment / industry details
    - Customers
    - Products / complexities
    - Competitive landscape
    - Geographic differences
  - PPG’s participation in the segment(s)
  - PPG’s growth opportunities
  - Site visit to visually see PPG products “at work” for our customers

PPG “Deep Dive” Program

PPG Deep Dive is NOT:

- A PPG investor day
- An update on the quarter or current business trends
- A discussion on other PPG businesses
- A strategic update



Education is the focus; strong Q&A / participation desired

PPG "Deep Dive" Program

Year	Topic(s)	Location	Details
2006	Transitions	Transitions HQ Tampa, FL	Overview of PPG's Transitions Optical joint venture
2007	PPG Aerospace	PPG aerospace facility Huntsville, AL	Discussed PPG's participation in the Aerospace coatings, sealants and transparency industry
2008	SigmaKalon Acquisition Overview	Offsite	Reviewed details (markets, customers, regional coverage, etc.) of PPG's largest acquisition which closed in January, 2008
2010	PPG Asia and PPG Auto OEM Coatings	BMW facility Greenville, SC	Provided details of PPG's Asian operations and rapid growth history/prospects. Overview of PPG's automotive OEM coatings business and auto OEM end-market dynamics.
2011	PPG Automotive Refinish	Penske Racing facility Charlotte, NC	Detailed review of global coatings auto collision repair industry, including distribution processes and key customer requirements. Review of PPG's new technologies addressing market needs.
2012	PPG Industrial Coatings	Harley Davidson facility York, PA	Overview of the broad, consolidating general industrial coatings industry with various product segmentation around end-use, application methodology and substrate.
2013	PPG Packaging Coatings	Ball Container facility Williamsburg, VA	Discuss packaging coatings industry, current market place dynamics and product trends and growth opportunities.
2014	**PPG Architectural Coatings**	**PPG company-owned stores, Lowes & The Home Depot retail locations Dallas, Texas**	**Discuss global architectural coatings regional demand and trends, and update of PPG's North America architectural coatings acquisition.**

Key Acronyms and Terms Used in the Presentation

Term	Geographic Meaning
USCA	United States and Canada
EMEA	Europe, Middle East and Africa
AMEFO	Africa, Middle East, French Overseas
AFOS	Africa, French Overseas
AP	Asia-Pacific
LA	Latin America
WE	Western Europe
EE	Eastern Europe

Term	Industry Meaning
AC	Architectural Coatings
DIY	Do it Yourself Consumer
BIY	Buy it Yourself, Professional Applied
Trade	Trade Professional Painter
Branded	Manufacturer Branded Product
Private Label	Manufacturer Produced Product Under Brand Owned by Retailer
ASP	Average Selling Prices
Big Box	National Retailer
R&R	Remodel and Repaint
Deco	Architectural (Decorative) Coatings



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Global Coatings Positions

Lower <---- Level of End-Use Consolidation ----> **Higher**

	Global Coatings	Arch. ~$48B	General Industrial ~$35B	Protective & Marine ~$13B	Refinish/ Collision ~$7B	Auto OEM ~$9B	Packaging ~$3B	Aerospace ~$1B
PPG	*#1*	#1	#2	#2	#1	#1	#2	#1
AkzoNobel	*#2*	#1	#1	#1	#3		#3	#2
Sherwin-Williams	*#3*	#1	#4+	#4+	#4+			#4+
Axalta	*#4*		#4+		#1	#3		
Valspar	*#5*	#4+	#3	#4+	#4+		#1	
BASF	*#6*	#4+	#4+		#4+	#2		

#1 Position #2 Position #3 Position #4+ Position No Meaningful Presence

PPG is the only company with participation in all end-uses

Source: PPG Estimates



PPG Architectural Coatings
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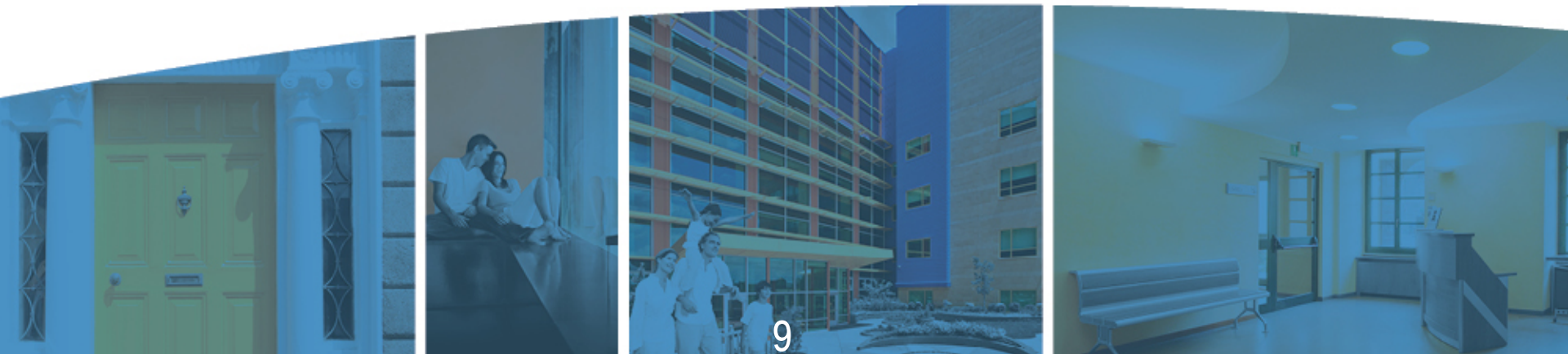
PPG Architectural Coatings

Michael H. McGarry
Executive Vice President

May 15th, 2014
Dallas, Texas



Architectural Coatings - Business Definition

- Decorative and functional products including paints, stains, lacquers, primers and clears
- Products include interior and exterior coatings / solvent and waterborne
- Primary applications include residential and commercial
- Applied by paint professionals and do-it-yourself consumers
- Distributed through a variety of channels including big-box retailers, independent distribution, company-owned stores and direct sales



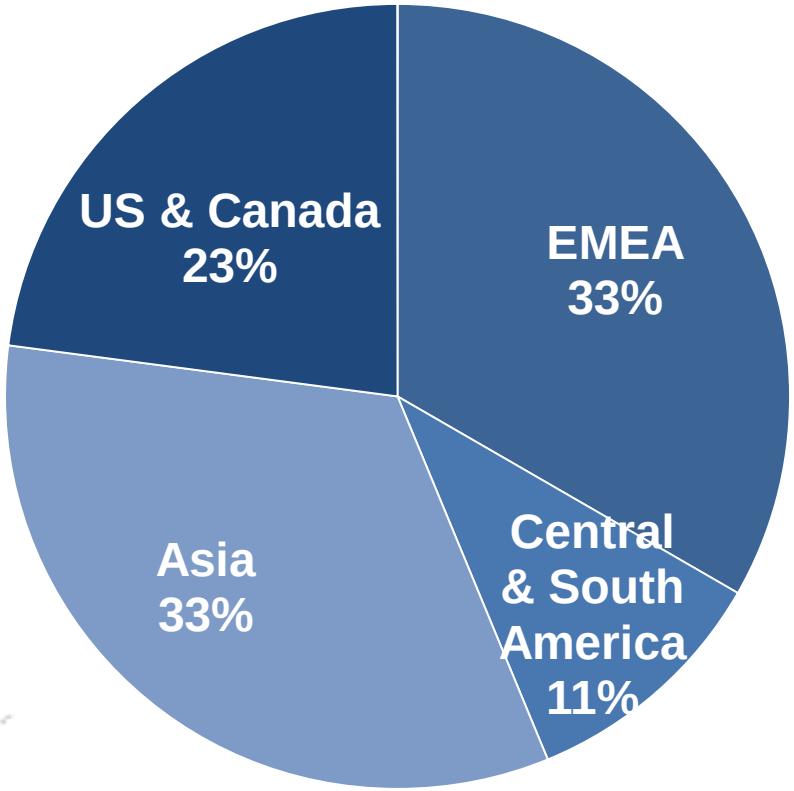
Architectural coatings represent ~50% of overall coatings volume and ~45% of revenue

Architectural Coatings Industry Size By Region

Regional split and current market trends

US and Canada:

- Residential market recovery underway
- Non-residential recovery still pending



EMEA:

- Markets stabilized
- Early signs of recovery in certain countries

Asia-Pacific:

- Emerging markets generally growing
- Stable in Australia

Latin America:

- South America mixed trends
- Latin America growing

Source: PPG Estimates, KNG, IRL, Orr & Boss

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Architectural Coatings Industry Size By Region

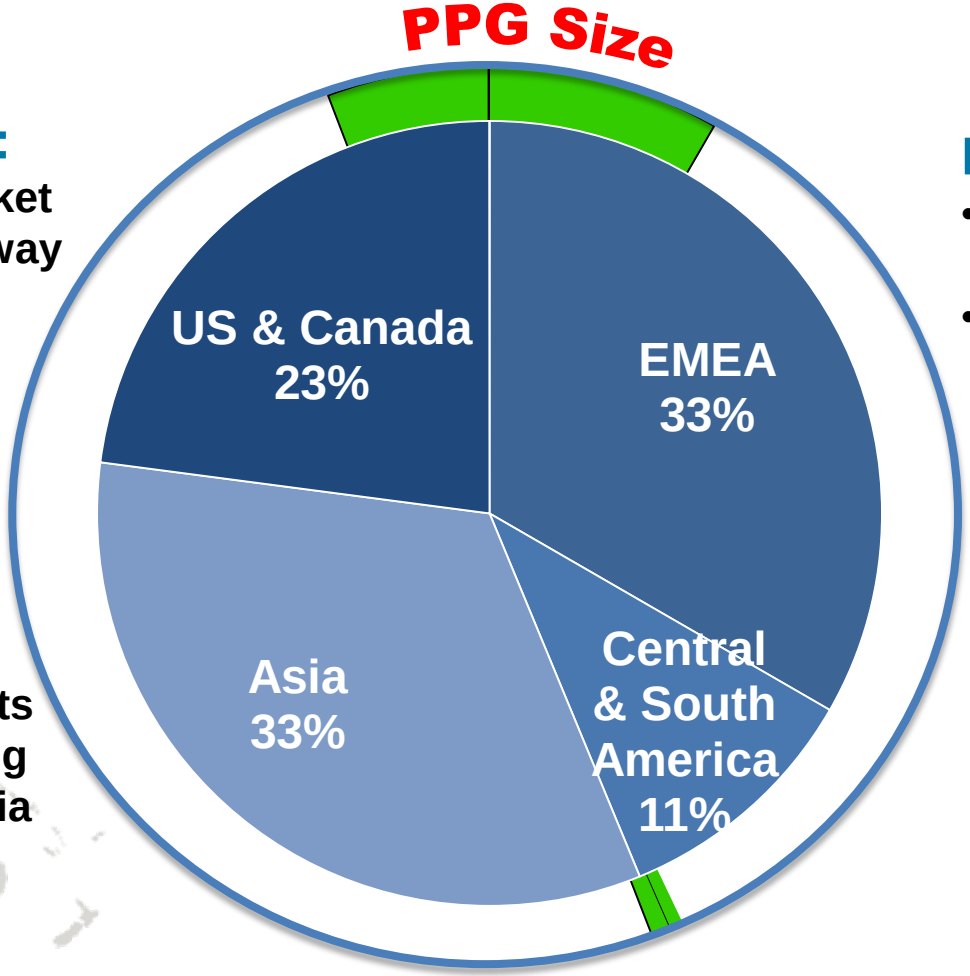
Growth/consolidation opportunities remain for PPG

US and Canada:

- Residential market recovery underway
- Non-residential recovery still pending

Asia-Pacific:

- Emerging markets generally growing
- Stable in Australia



EMEA:

- Markets stabilized
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Latin America:

- South America mixed trends
- Latin America growing

Source: PPG Estimates, KNG, IRL, Orr & Boss

Global Architectural Coatings - Drivers of Growth

General economic trends coupled with construction industry activity

- **Consumer Sentiment**
- **Disposable Income**
- **Unemployment**

65% - Residential



35% - Commercial

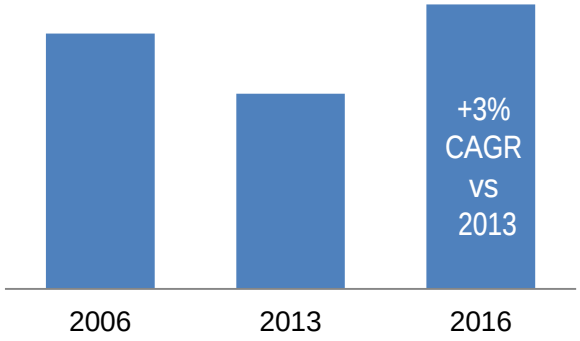


	% of Demand
New Construction	**25%**
Remodel / Repaint	**75%**
New Construction	**40%**
Remodel / Repaint	**60%**

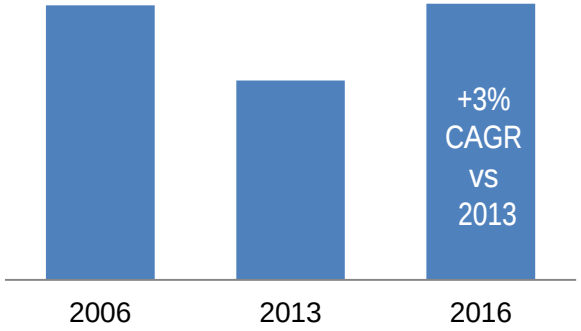
Source: PPG Estimates

Architectural Coatings Growth Rates by Region

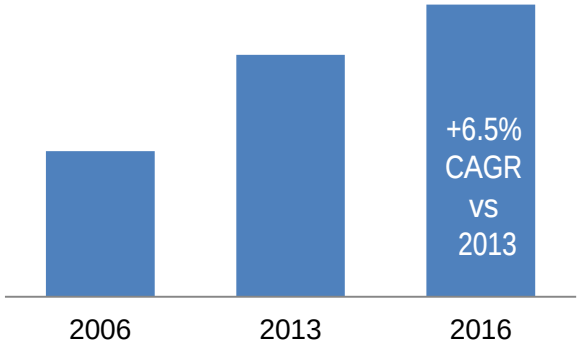
EMEA



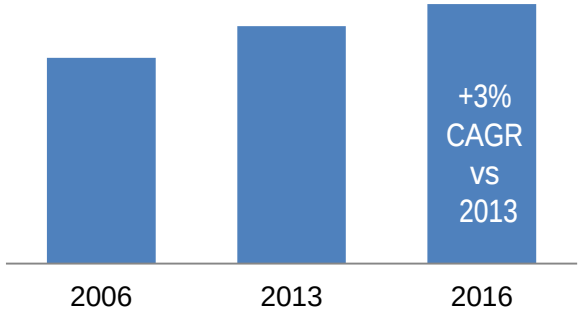
U.S. & Canada



China



Latin America



CAGR estimates regional volumes only (excludes price and mix impacts)

Growth (market expansion or recovery) anticipated in all regions

Source: Orr & Boss, PPG Estimates

Global Architectural Coatings - Top 10 Competitors

Coatings Company	Geographic Focus	Primary Channel
PPG	Global	Multi-Channel
Sherwin-Williams	Primarily N.A. & S.A.	Stores
AkzoNobel	Global – Excluding N.A.	Multi-Channel

Alphabetical Order

Asian Paints	India	Multi-Channel
BASF (Suvinil)	Brazil	Multi-Channel
Benjamin Moore	US	Independents
DAW Caparol	Europe	Multi-Channel
Nippon / Nipsea	Asia	Multi-Channel
Masco (Behr)	US	Home Centers
Valspar	N.A. and Asia	Home Centers, Independents



Architectural Coatings Competitors

Companies	Market	Size
Top 3	~25%	>$5B
Next 17	~35%	$0.75B – $3.0B
Next 60	~30%	Avg. $0.5B
Thousands	~10%	<$0.5B

Small number of global architectural players

Source: PPG Estimates, KNG, IRL, Orr & Boss

Global Architectural Coatings - Competitors 11 -to- 20

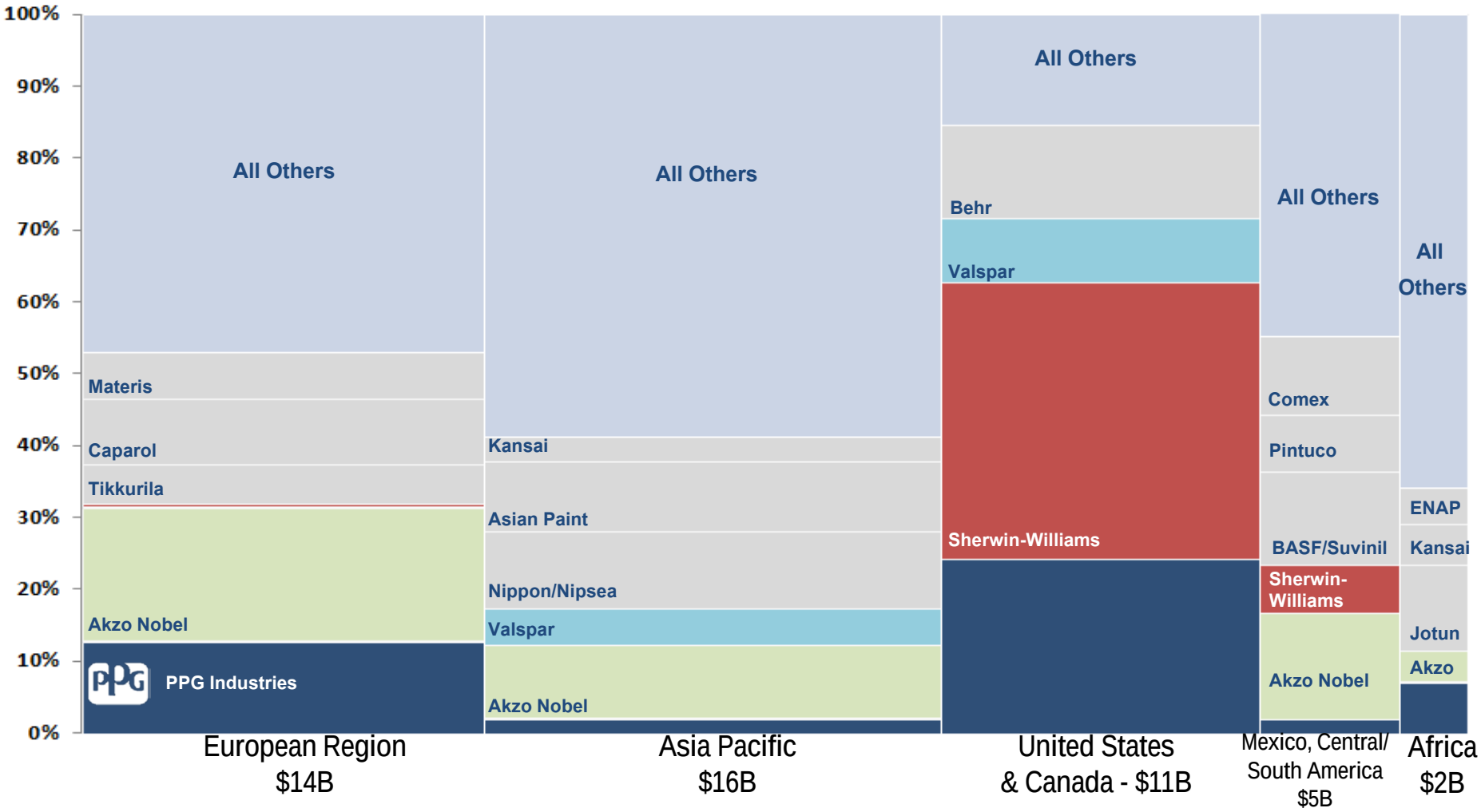
Alphabetical Order

Coatings Company	Geographic Focus
Berger Paints	India
Brillux	Germany
Comex	Mexico
Dulux Australia	Australia
Dunn Edwards	Western US
Jotun	Middle East
Kansai	Japan
Materis	Southern Europe
Meffert	Germany
Tikkurila	Europe

Top 20 architectural companies represent ~60% of global revenues

Source: PPG Estimates, KNG, IRL, Orr & Boss

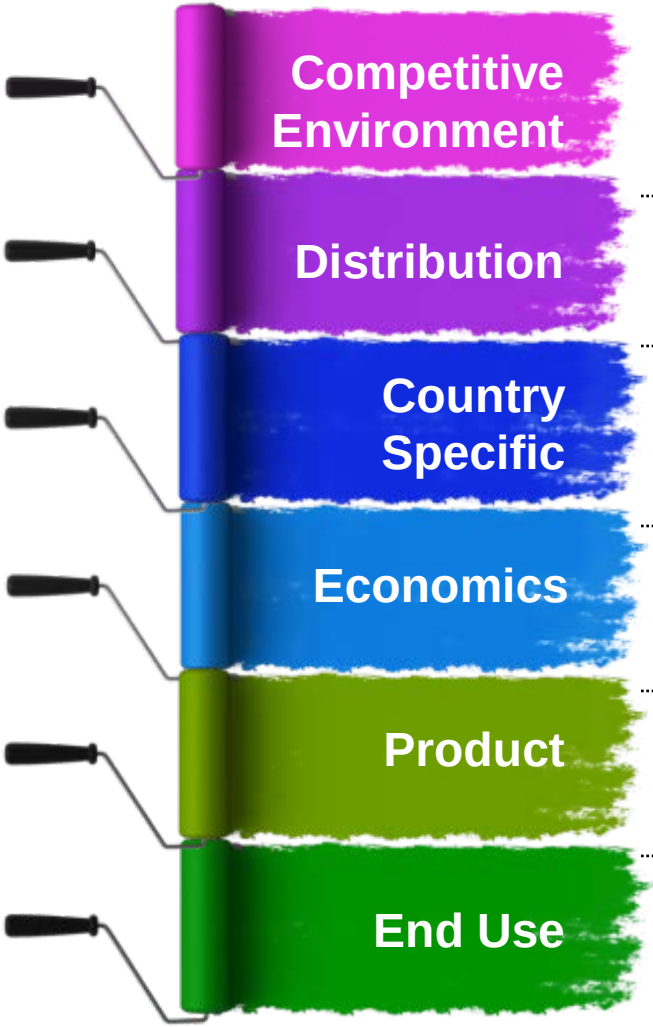
Architectural Coatings – Size and Regional Revenue



PPG is only company with meaningful participation in every region

Source: PPG Estimates, KNG, IRL, Orr & Boss

Global Architectural - Unique Regional Characteristics



- **Competitive Environment**
  - Generally fragmented
  - Local -to- regional competitors
- **Distribution**
  - Home centers
  - Wholesalers
  - Company-owned stores
  - Independent distributors
- **Country Specific**
  - Brand focus
  - Cultural norms
  - Freight costs
  - Construction substrates (wood, masonry, drywall)
  - Weather / seasonality
- **Economics**
  - Premium vs. value
  - Average selling prices
  - Consumption per capita
  - Economy driven (trading up and down)
- **Product**
  - Branded vs. private label
  - Pre-mix vs. tinting
  - Packaging conventions
  - Formulation/product content
  - Water base vs. solvent
  - Matte or gloss preference
- **End Use**
  - Professional, DIY, BIY
  - Residential or commercial
  - Interior vs. exterior
  - New construction or R&R

Regional combinations create complexity, opportunity

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Global Architectural Coatings – Characteristics

	GLOBAL	US	WE	EE	CHINA	BRAZIL
COMPETITIVE ENVIROMENT						
Competitive Market	Fragmented	Consolidating	Fragmented	Fragmented	Fragmented	Fragmented
Geographic	Country	Regional	Country	Country	Regional	Country
ECONOMICS						
Average Selling Price	Moderate	Moderate	Moderate	Low	Low	Low
Consumption Per Capita	Moderate	High	High	Low	Moderate	Low
Trading Up & Down	Mixed	Low	Prevalent	Prevalent	Low	Prevalent
Products						
Premium	Mixed	More Premium	More Premium	More Value	Varies by Tiers	More Value
Value	Mixed					
COUNTRY SPECIFIC						
Paint Season Months	Mixed	Mar-Nov	Mar-Nov	Apr-Sept	Mar - Dec	Sept-Dec
Cultural Norms	Mixed	--	Wide Variety	Wide Variety	Different in Tiers	Holiday Paint
Freight Costs	Mixed	Moderate	Moderate	Moderate	Moderate	High
Construction Substrates	Various	Wood	Various	Various	Concrete	Concrete

PPG - Managing various business models to support regional characteristics

Source: PPG Estimates, KNG

Global Architectural Coatings - Customer Mix

Distribution Channel Mix Varies Significantly by Region

Large Retail / Big Box



N.A. DIY



Australia DIY

Independent Distribution



Independent Distributor - Brazil



Independent Distributor - Poland

Company-Owned Stores



U.S. Company-Owned Store



Slovakia Company-Owned Store

PPG participates in all channels

Global Architectural Coatings - Customer Mix

1/3

Large Retailers

- Mostly DIY
- Focus on brands
- Heavy advertising and promotion
- Some have operations in multiple countries

2/3

Company-Owned Stores

- Higher trade / professional focus
- Focus on quality and service
- Delivery and local sales representatives
- Small end-use customers

Independent Distributors

- Hardware chain / co-ops
- Multi-brand sellers

Wholesalers

- Builder merchants – Asia specific



Customer and regional preferences dictate distribution approach

Global Architectural Coatings – Characteristics

	GLOBAL	US	WE	EE	CHINA	BRAZIL
DISTRIBUTION						
Home Centers	30%	High	High	Moderate	Low	High
Independents	35%	Contracting	Moderate	High	High	High
Company Stores	35%	High	High	Low	Low	Low
END USE						
Professional **DIY/BIY**	60% 40%	Similar to Global	More DIY	Similar to Global	More Professional	Similar to Global
Residential **Commercial**	65% 35%	Similar to Global	Similar to Global	Similar to Global	More Comm.	Similar to Global
New **Remodel/Repaint**	30% 70%	Similar to Global	More Remodel	More Remodel	More New	Similar to Global







Preferred distribution methods vary greatly by region

Source: PPG Estimates, KNG

Global Architectural Coatings – Characteristics



	GLOBAL	US	WE	EE	CHINA	BRAZIL
PRODUCT						
Branded **Private Label**	80% 20%	Mostly Branded	Private label	Private label	Mostly Branded	Mostly Branded
Pre-Mix Tinted	Mostly Tinted	Highly Tinted	Partially Tinted	Mixed	Mixed	Mixed
Packaging	Varied	Varied	Varied	Varied	Varied	Metal
Titanium Dioxide Content	25%- 30%	Higher	Higher	Lower	Lower	Lower
Water Base **Solvents**	80% 20%	85% 15%	90% 10%	70% 30%	70% 30%	75% 25%
Interior **Exterior**	70% 30%	70% 30%	70% 30%	70% 30%	80% 20%	70% 30%





Consumers purchase product to meet individual tastes/needs

Source: PPG Estimates, KNG

Coatings Cost Comparison

Raw material basket and manufacturing/distribution costs are different



Sold in 1 Gallon Paint Cans And 5 Gallon Buckets

Average Architectural Coatings

Industry estimates – figures vary greatly by end-use and application

- Distribution - final
- Distribution - intermediate
- Packaging
- Manufacturing
- Additives
- Solvents and Pigments
- Resins and Latex
- Titanium Dioxide

Average Industrial Coatings

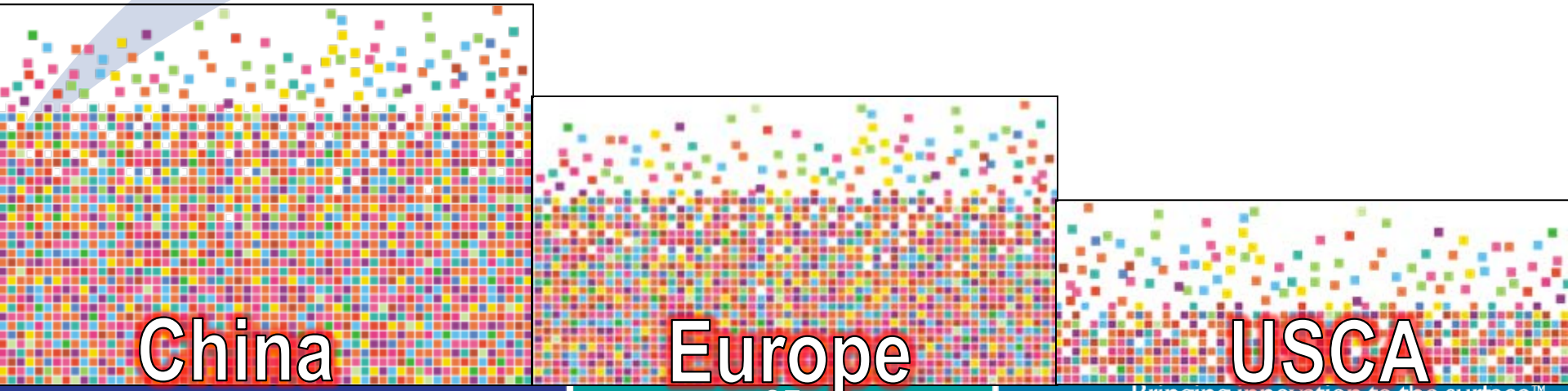
- Distribution - final
- Packaging
- Manufacturing
- Additives
- Solvents and Pigments
- Resins and Latex
- Titanium Dioxide



Sold in 2,000 Liter Totes

Evolution of Architectural Coatings Markets

Companies		
Hundreds/Thousands of Local	→	**Multi-National and Local**
Channels		
Independent Dealers	→	**Company-Owned Stores & Big Box**
Branding		
Low Brand Awareness	→	**High Brand Preference**
Technology		
Low Application & Adoption	→	**High Application & Adoption**



Global Architectural Coatings Summary

- Demand in each major region is generally growing or recovering
- Each region has a unique combination of market characteristics
- Regional brands remain important
- Consolidation opportunities exist in all regions
- PPG is a global participant with various growth opportunities





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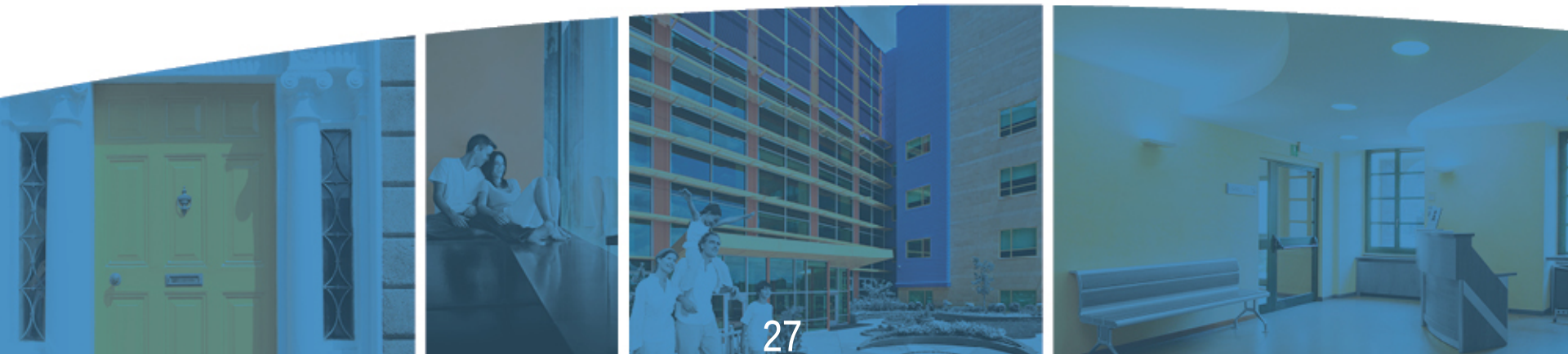


PPG Architectural Coatings History



1900 — **Acquired: Patton Paint Company**

1950's, 1960's, 1970's, 1980's — **Architectural regional demand very fragmented and generally lacked scale benefits**

1990's — OLYMPIC

2000's — **US Company Store Growth**

SIGMA COATINGS, Seigneurie

2010's — TAUBMANS, RENNER

Present — Glidden, DEFT, DYRUP



PPG Revenue Balanced by Channel

Global Architectural Coatings Mix

Various Regional Home Centers / Sheds 30%



National customers
Branded & private label
Generally DIY

Thousands of Independent Distributors 35%



Small -to- medium size
Multi-branded
Mix of professional and DIY

1,500 Company-Owned Stores 35%



Heavy focus on professional (many small customers)
Branded

PPG's global mix similar to global industry; Mix differs by region

PPG Global Architectural Coatings

Leading Brands, Distribution, and Operating Excellence

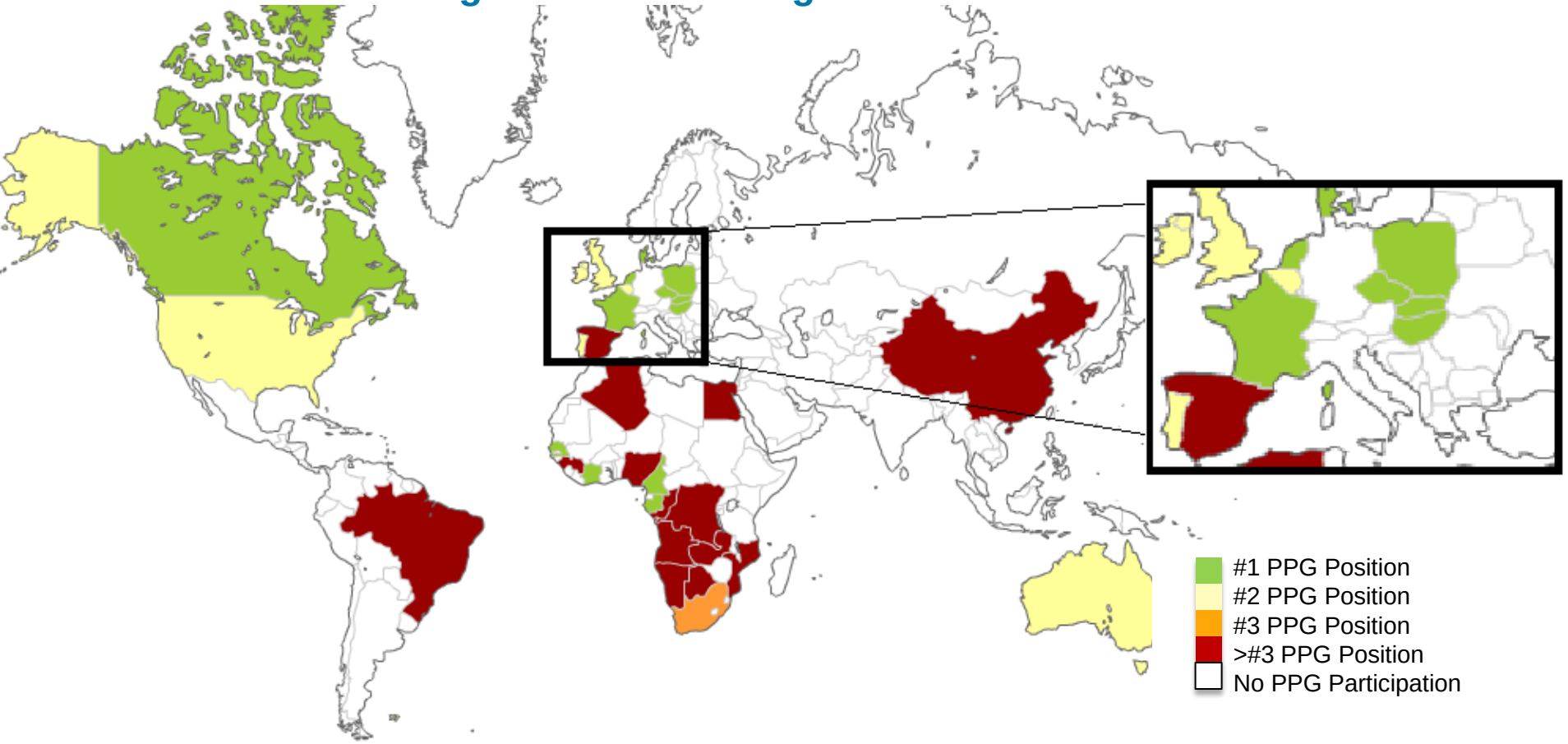


PPG - Participation in 50 countries globally

Source: Depicts Key PPG Brands

PPG Architectural Coatings Global Presence

Global reach with significant room to grow



PPG - Global supplier with considerable room to grow

Source: PPG Estimates, KNG, IRL, Orr & Boss

PPG Global Architectural Coatings Profile



Residential 80%



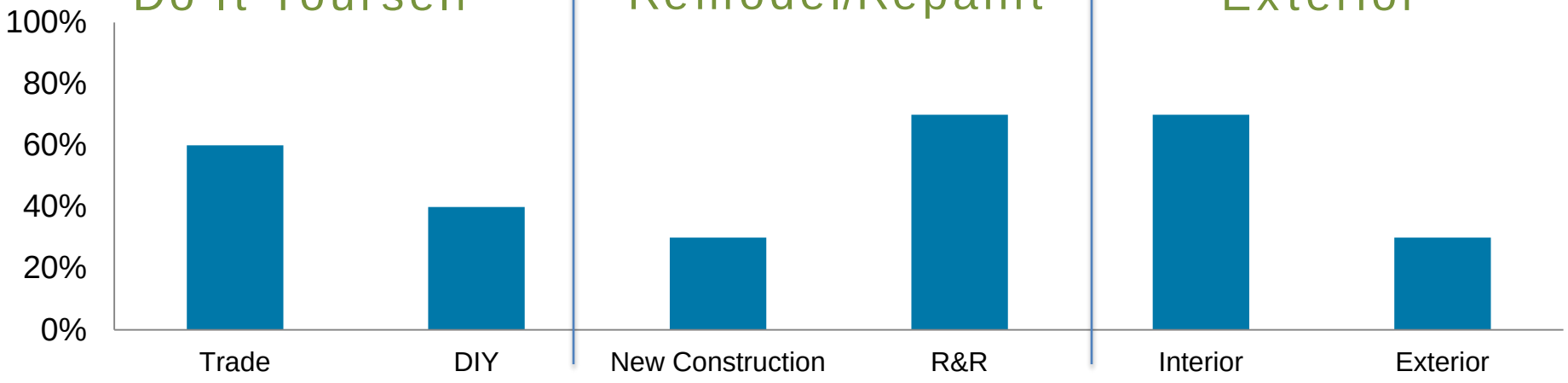
Commercial 20%

Broad Product Range

Decorative and functional products

- Paints
- Stains
- Clears
- Industrial
- Lacquers
- Primers
- Sundries
- Protective

Professional vs. Do-It-Yourself



New vs. Remodel/Repaint

Interior vs. Exterior

PPG mix - consistent with overall demand in each category

Source: PPG Estimates, KNG, IRL, Orr & Boss

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PPG Architectural Coatings Technology Profile

New architectural products focused on solving complex customer needs

Customer / Industry Trends Addressed:

- Health & Safety
- Sustainability
- Energy Management
- Asset Protection
- Customer's productivity
- Colors & Aesthetics

New Product Sales	% of Sales
2007	19%
2013	23%

PPG - Unique ability to maximize technology across all coatings end-use markets

PPG New Product Catalog



Taubmans Endure

Large growth in Bunnings Home Center Australia



Evolve

Most Innovative Product – 2014 MassBuild Confex South Africa



Olympic Rescue It!

Lowes 2013 Product of the Year North America





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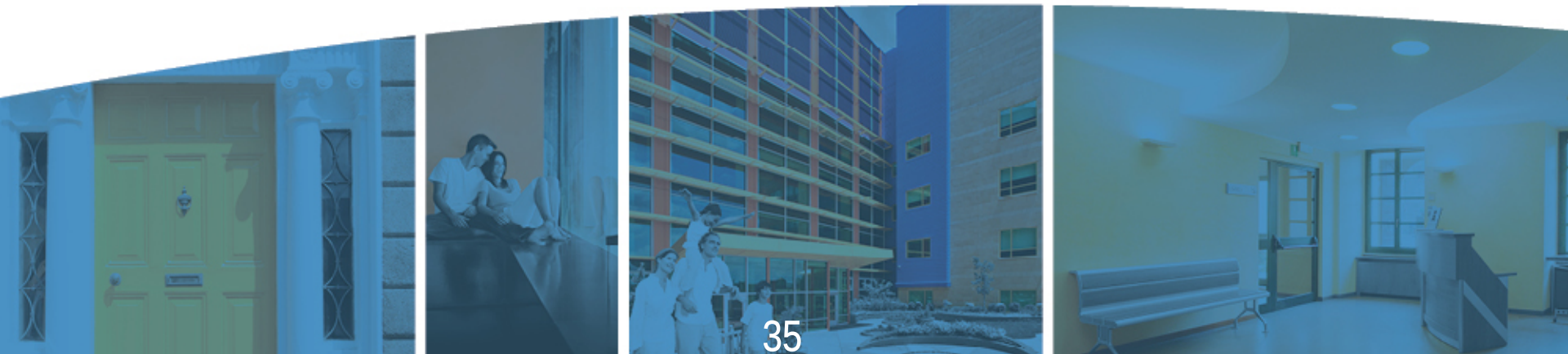
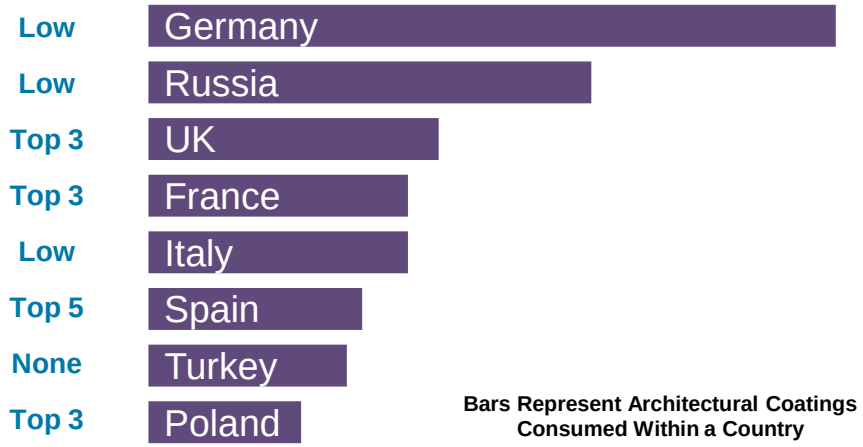
Regional Overview:
European Architectural Coatings



Industry Details – Europe, Middle East, Africa

Key Geographies

PPG Architectural Coatings Presence



Bars Represent Architectural Coatings Consumed Within a Country

Top Participants

- AkzoNobel
- PPG
- Tikkurila
- DAW Caparol
- Materis
- Brillux
- Jotun

Regional Industry Characteristics

- Private label prevalent in home centers / sheds
- Western Europe (WE): premium price and higher per capita consumption
- Eastern Europe (EE): value price with solid growth potential
- Sizable population in emerging European markets

Outlook

- UK & Ireland growing
- Recovery started and being led in WE, but pace inconsistent by country
- Lagging recovery overall in EE, although growth in some countries

Source: KNG

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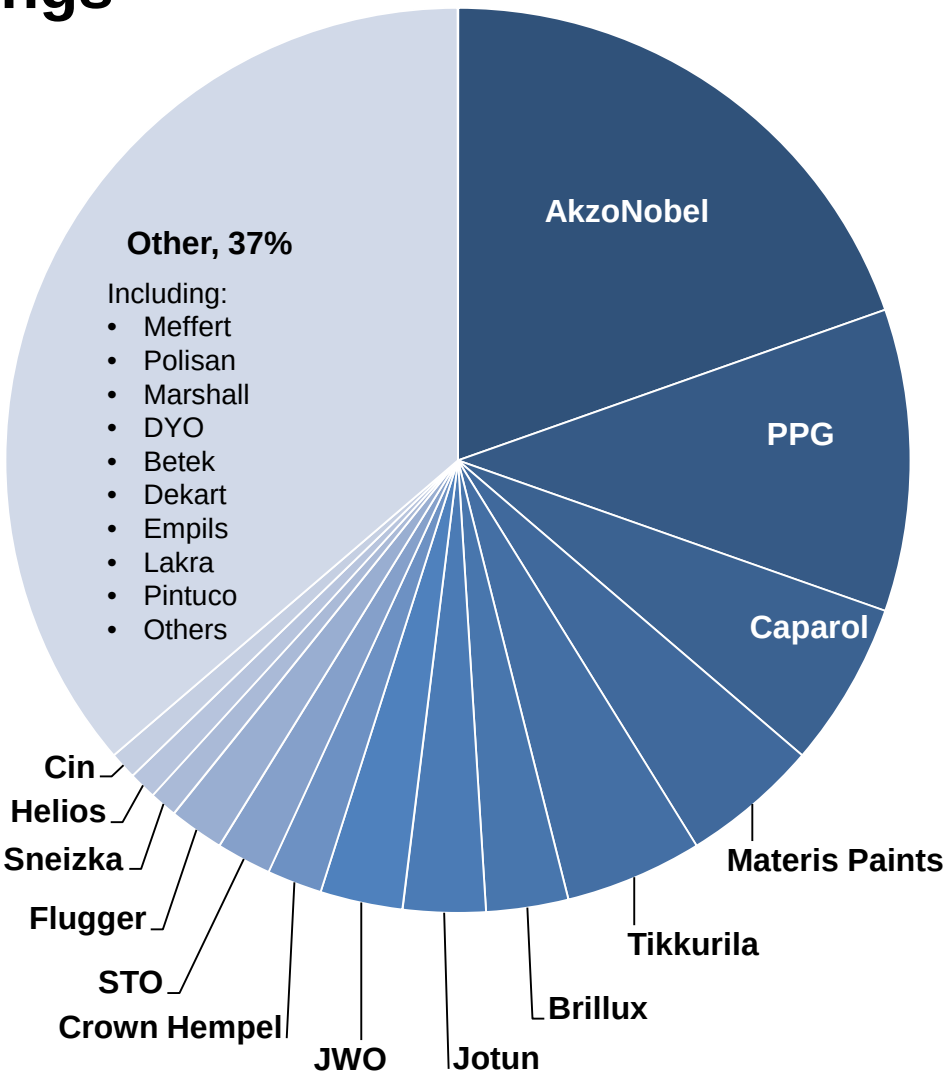
European Architectural Coatings

- $14B in architectural coatings sales (excluding Africa)
- Still very fragmented with country specific scale and demand
- Many competitors, different by country
- Sizable demand contraction since the 2008-2009 recession

Key Attributes	
Primary Distribution	Professional Networks
Professional/DIY	50% - 50%
Selling Price	Various/Product Based
Consumption Per Capita (liters)	West (8) East (4)
Competitive Environment	Fragmented
Other Unique Attributes	Product mix varies; High degree of seasonality



Source: PPG Estimates, KNG, IRL, Orr & Boss

Selected Competitor Country Examples

Varied Landscape by Country

UNITED KINGDOM
- AkzoNobel
- PPG
- Hempel (Crown)
- Ostendorf
- Sherwin-Williams

POLAND
- PPG
- AkzoNobel
- Sneizka Paints
- Tikkurila

FRANCE
- PPG
- AkzoNobel
- Materis
- V 33
- Somefor
- STO

IBERIA
- Cin
- Materis
- PPG

ITALY
- >500 paint companies



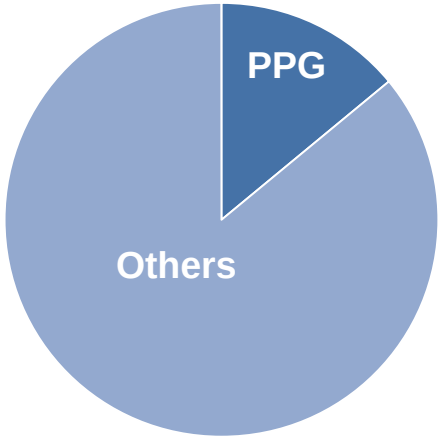
In addition to global & regional players, strong local competitors exist

West and East Not Homogenous

Western Europe:

- Higher focus on quality/service
- Economies still impacted by recession
- Mature distribution model
- Some large countries still highly fragmented

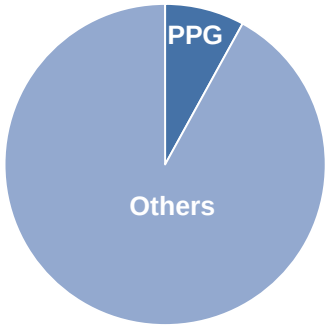
2013: $10B Revenues



Eastern Europe:

- Higher seasonality
- Greater focus on value
- Lower per capita spending
- Distribution model still developing
- Professional trade segment under developed

2013: $4B Revenues



Growth opportunities remain for PPG within the region

Source: PPG Estimates, KNG, IRL, Orr & Boss

Further Uniqueness by Segment Traits

Examples:

Pricing

- **Variations in average selling price driven by:**
  - Product mix
  - Product offering
  - Distribution

Distribution Structure

- **Large company-owned store networks for professionals**
- **Multi-national DIY – stronger presence in West**
- **DIY developing in East**

Product Mix

- **Regional construction techniques driving variations**
  - Wood in Scandinavia
  - External facade and plasters in France and Germany
- **Exterior paint = 40% of demand**

Competitive Environment

- **Multi-nationals & strong regionals**
- **Large countries/territories still highly fragmented with local coatings companies**

Strong local preferences drive products and distribution

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Unique Traits by Country As Well

Examples:

Netherlands

- 50% of demand is lacquers resulting in higher premium oriented product array
- Dedicated distributor channels

France

- Customer focus on exterior paint
- Company-owned stores network is most prominent

Germany

- Generally a wholesale and distributor model
- Recent changes in competitive landscape

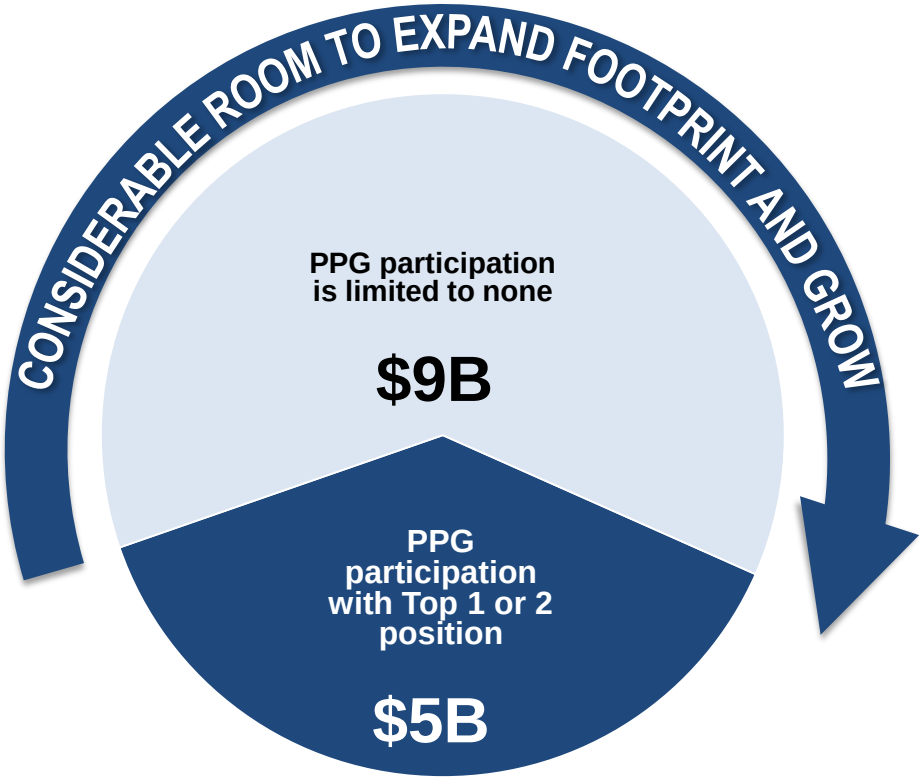
U.K. & Ireland

- Variety of local and multi-national competitors
- Multiple distribution channels
- Heavy brand reliance

Significant differences between countries

European Architectural Coatings Demand ($14B)

Demand in regions relative to PPG Presence





PPG positioned in Europe for growth

Source: PPG Estimates, KNG, IRL, Orr & Boss

PPG Architectural EMEA Enhancing Its Position

Employing individually tailored strategies to drive growth

France

- ✓ Leader with professionals
- ✓ Extensive, growing store network
- ✓ Leveraging protective coatings

Benelux

- ✓ New products and painter programs
- ✓ A leading brand in region

Scandinavia

- ✓ Entrance into region with distribution partners

Poland and Central Europe

- ✓ Maintaining leading local positions
- ✓ Growing store and franchisee networks
- ✓ Stronger position in D-I-Y

United Kingdom

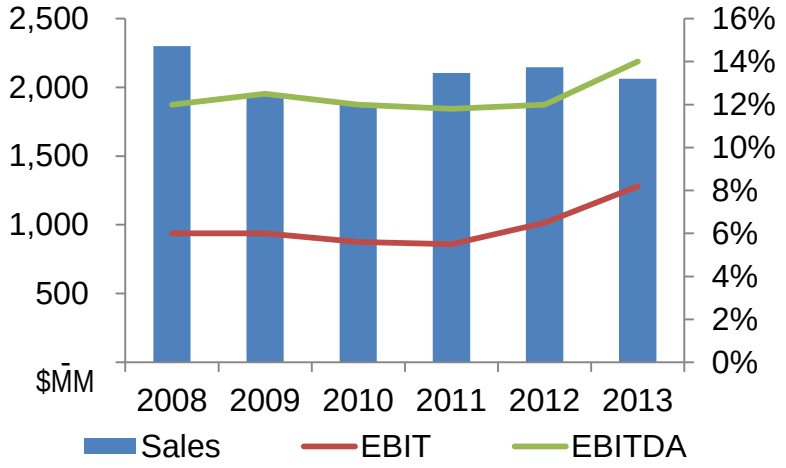
- ✓ Creating Leyland brand pull with painters
- ✓ More distribution being added
- ✓ Store network performance is outpacing industry average

Africa

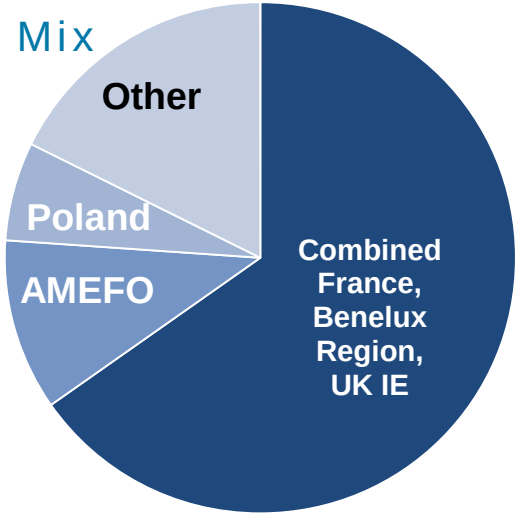
- ✓ Well recognized regional brands
- ✓ Many leading positions in various countries with continued room to grow

PPG Architectural Coatings EMEA Metrics

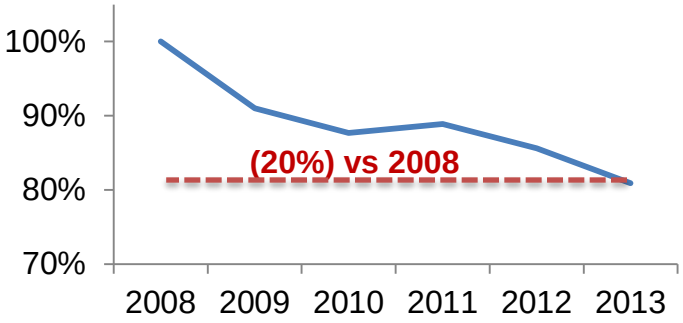
Financial Performance



PPG Revenue Mix

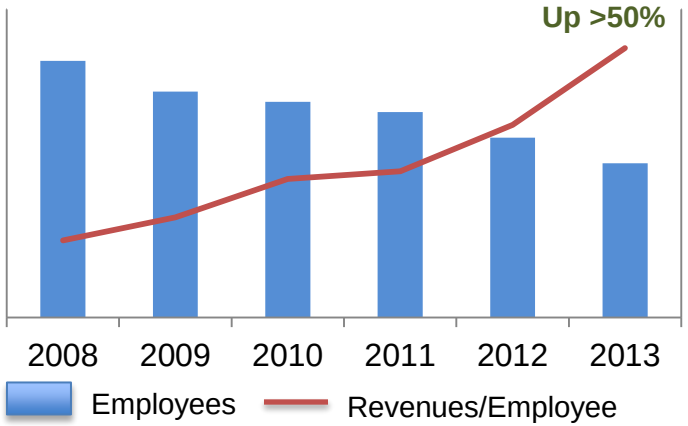


PPG & Industry Volume Trend



PPG Company–Owned Stores	
UK & Ireland	200
France	175
Eastern Europe	100
AMEFO	75
Northern Europe	50
Total	**600**

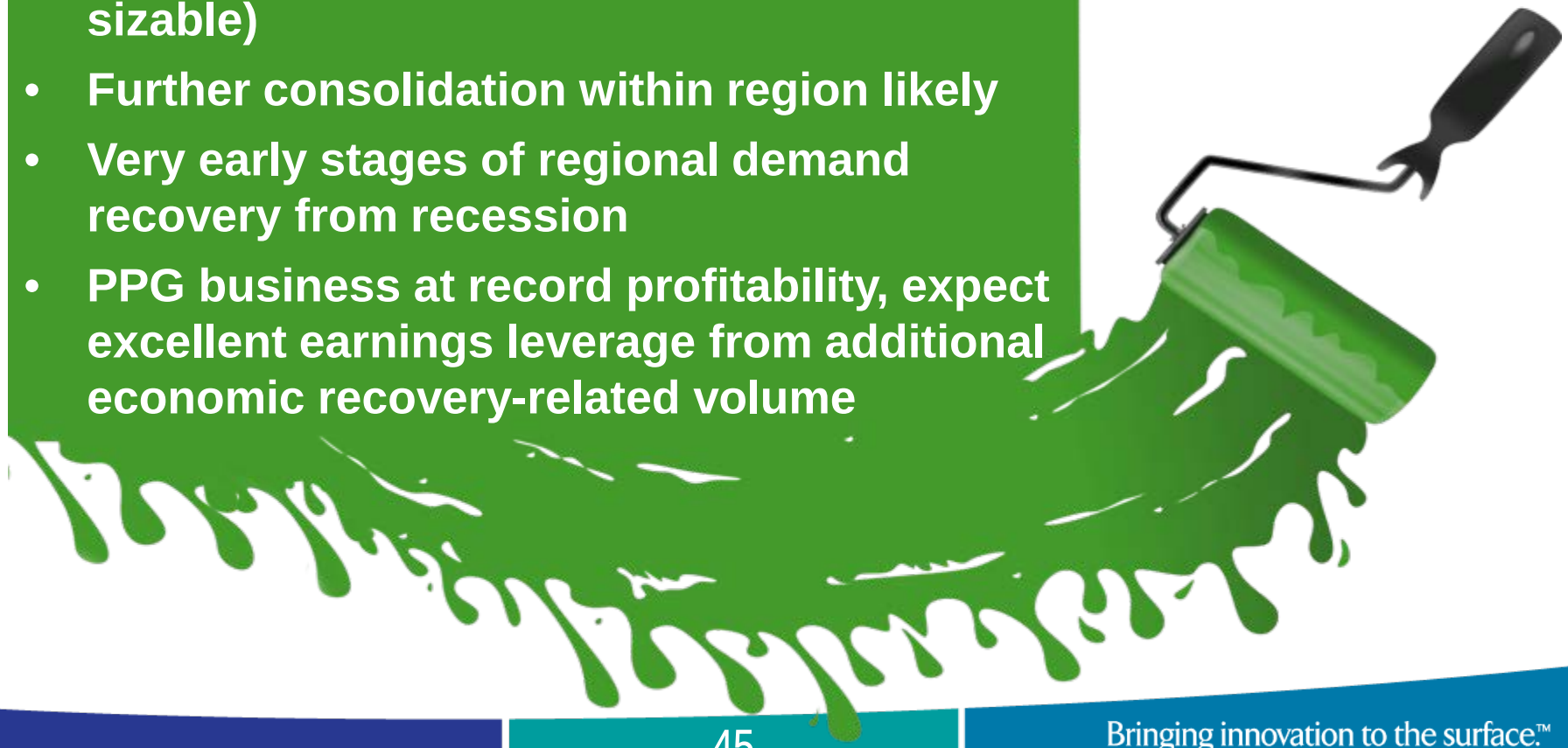
PPG Productivity



Volumes down 20% since 2008, earnings up >20%

Europe Architectural Coatings Summary

- Europe, Middle East and Africa is largest architectural coatings region globally
- Distinct differences by sub-region, country
- Many, many local competitors (some sizable)
- Further consolidation within region likely
- Very early stages of regional demand recovery from recession
- PPG business at record profitability, expect excellent earnings leverage from additional economic recovery-related volume





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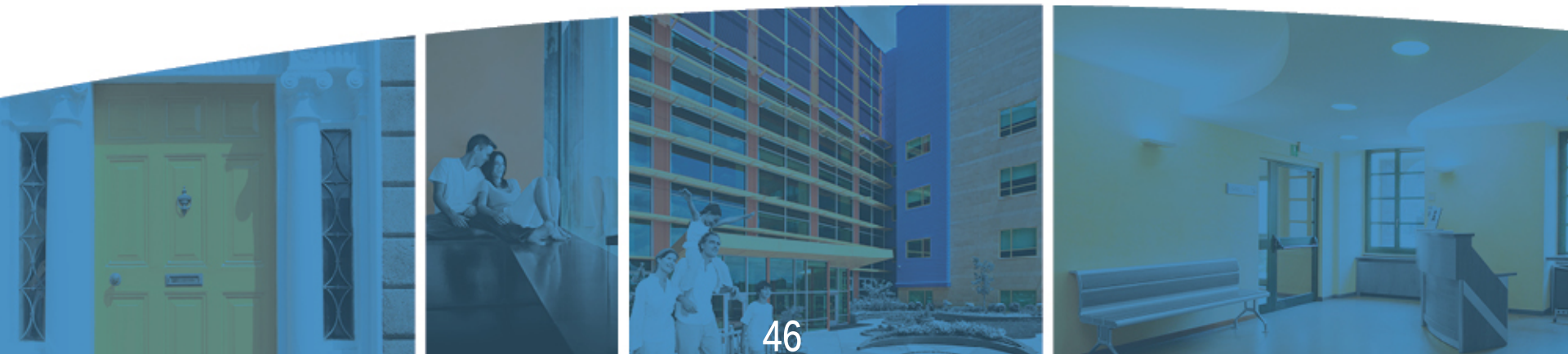
Regional Overview:
Asia-Pacific Architectural Coatings



Industry Details – Asia-Pacific

Key Geographies

- China
- India
- Japan
- Australia/New Zealand

Top Participants

- Nippon / Nipsea
- AkzoNobel
- Asian Paints
- Dulux (Australia)
- Valspar
- Thousands of others

Regional Industry Characteristics

- Competitors vary significantly by country
- Historically low per capita consumption in emerging countries
- Higher growth rates in China

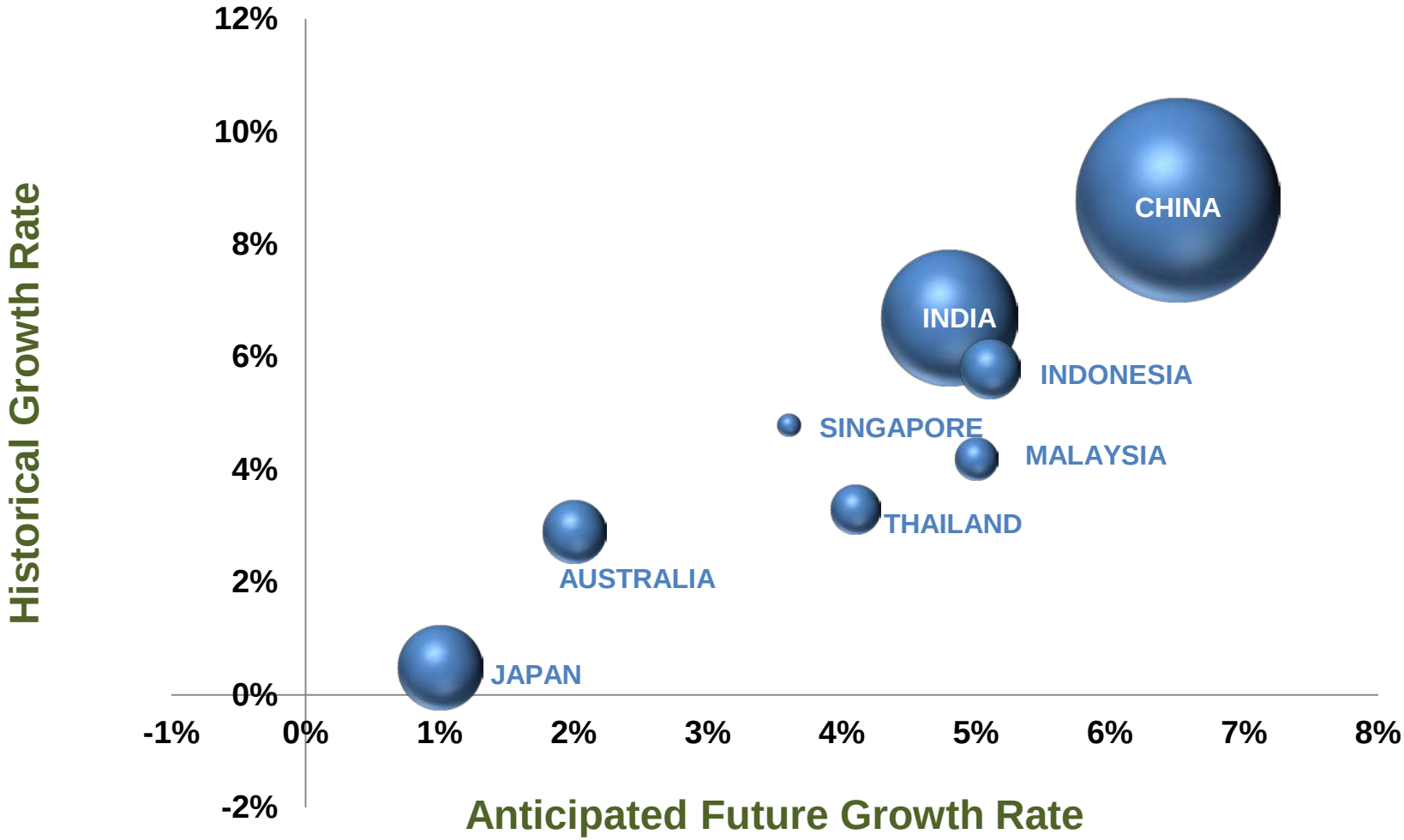
Outlook

- Regional growth rates remain above developed regions; China growth continues
- Consolidation likely in countries and across region
- Currently PPG architectural coatings participation low within the region

Source: PPG Estimates, KNG, IRL, Orr & Boss

Asia-Pacific Architectural Coatings Growth

Remains the highest growth potential region

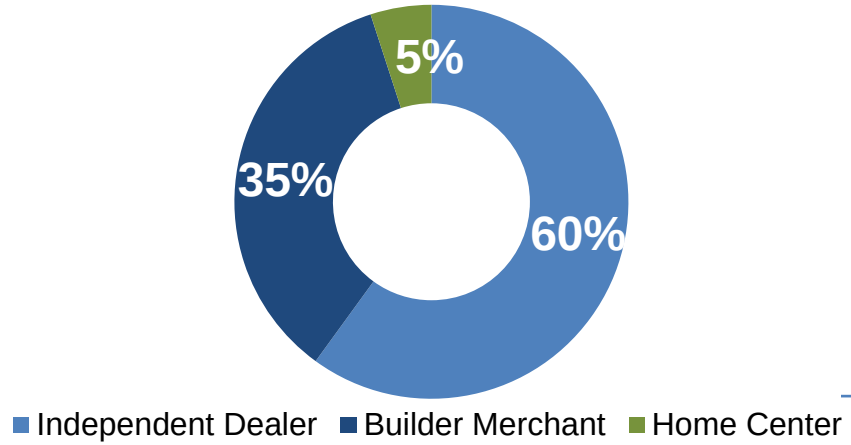


Bubble size = 2013 Architectural Paint Demand

Source: Orr & Boss

Asia-Pacific Architectural Coatings Industry

Revenue by Channel



Key Attributes	
Primary Distribution	Independents
Professional/DIY – Australia	60/40
Professional/DIY – Remainder of Asia	90/10
New vs. Remodel/Repaint	45/55
Selling Prices	Varies Widely
Consumption Per Capita (gal)	1.5
Competitive Environment	Fragmented

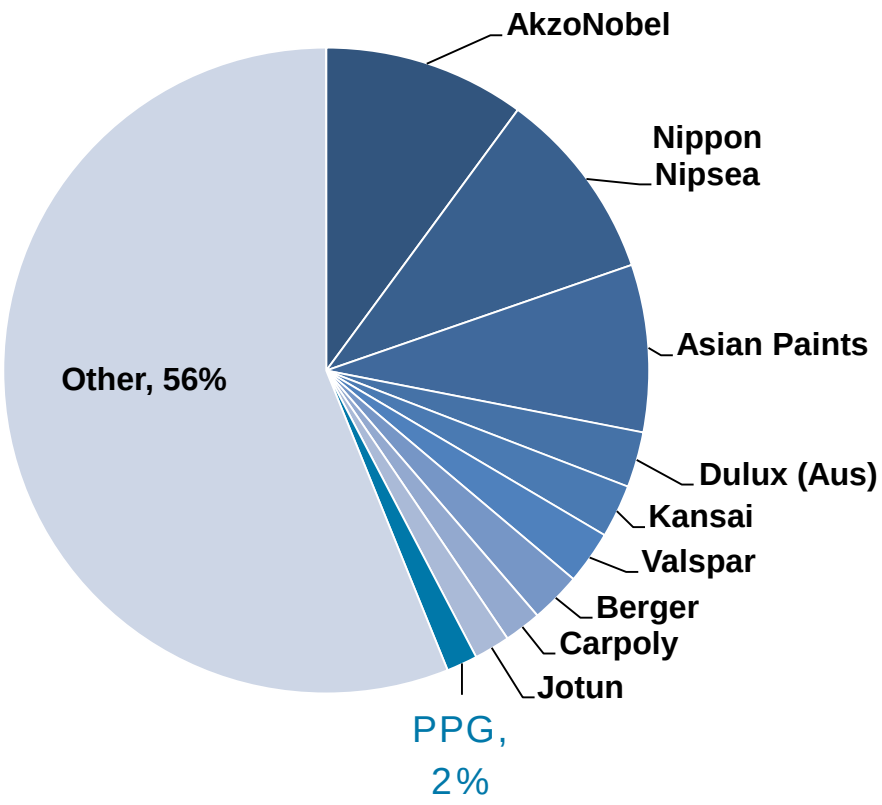
Channel	Customers	Characteristics	2013-2018 CAGR
Independent Dealer	• Professionals • DIY/BIY	• Primary channel within the region • Brand awareness • Distribution/product	↑
Builder Merchant	• Contractors • Professionals	• Sales presence with decision makers • High level of technical service	↑
Home Centers	• DIY/BIY	• Investment with home centers • Many brands – struggling channel in China • Important distribution channel in Australia	↓

Source: PPG Estimates, KNG, IRL, Orr & Boss

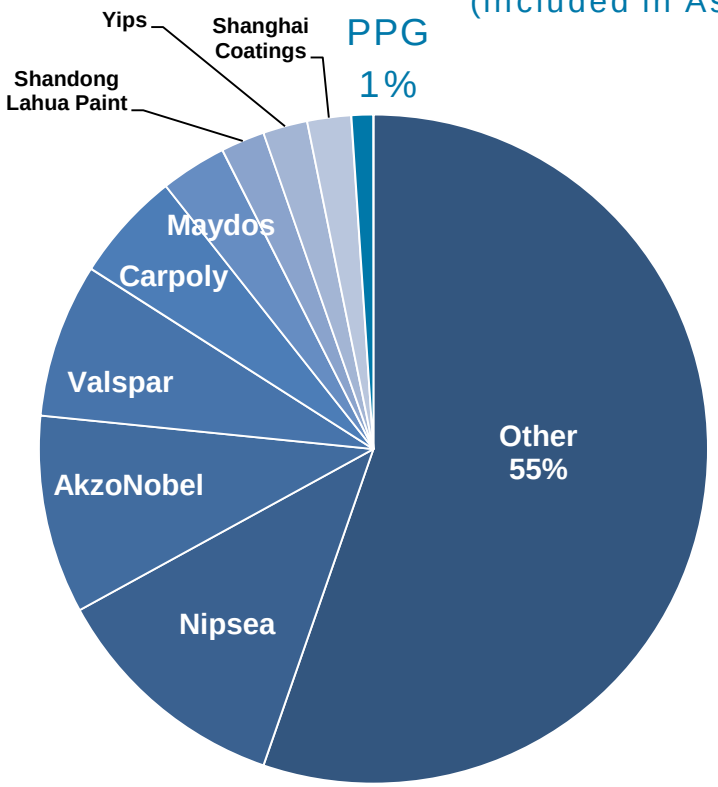
Architectural Coatings Participants

Fragmented by country

Total Asia-Pacific $16B



China $7B (included in Asia-Pacific)



Others Include:

- China Paint
- Jiangsu
- DGL Camel
- Northwest Yongxin
- First Paint
- Shanghai Shengxin
- Jiangsu Qiye Emulsion
- Shanghai Zhongnan
- Terraco

- Thousands of others competitors

Supply fragmented; Low PPG participation (growth opportunity)

PPG Asia-Pacific Architectural Coatings at a Glance

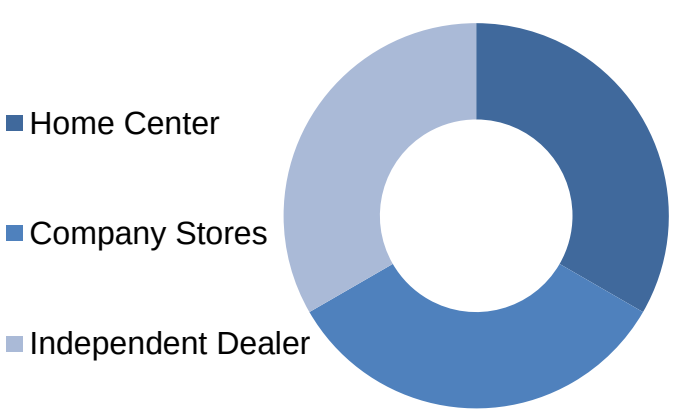
China

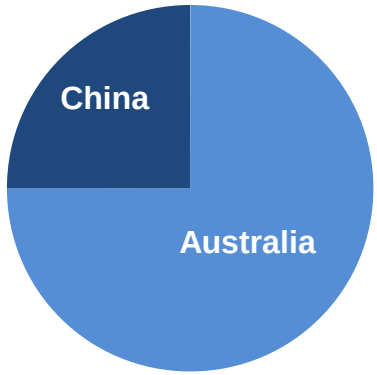
- Master's Mark® product competes favorably in premium range
- Seigneurie® used for project segment

Australia

- Strong partnership with Bunnings (leading home center)
- Growth opportunities remain in professional channel

PPG Regional Revenue Mix





PPG Key Facts	#
Company Stores	40
Employees	750
5 Year CAGR	+4%



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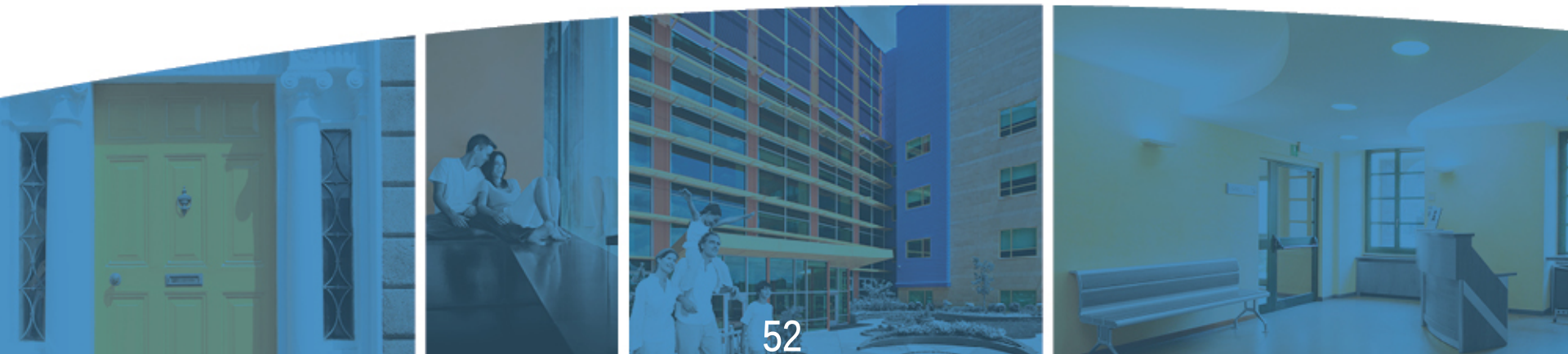
Regional Overview:
Latin America Architectural Coatings



Industry Details – Latin America

Key Geographies

- Brazil
- Mexico
- Central America

Top Participants

- BASF / (Suvinil brand)
- Comex
- Sherwin-Williams
- AkzoNobel (Coral)
- Pintuco

Industry Description

- Value orientated segment; Home centers are growing
- Independent distribution model
- BASF and AkzoNobel leaders in Brazil
- Comex and Sherwin-Williams leaders in Mexico

Outlook

- Higher growth expected in Central America
- Low -to- mid-single digit percentage growth in Brazil, but inconsistent

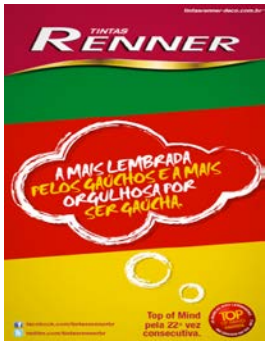
$5 billon architectural coatings demand with mid-single digit percentage growth

Source: PPG Estimates, KNG, IRL, Orr & Boss

PPG Architectural Coatings - Brazil at a Glance

Key Attributes	
Franchisees	100
Manufacturing	Gravatai
PPG Position	#6









- Acquired in 2007
- Heavily concentrated in southern Brazil
- Home centers, independent distributors and dedicated dealers

Emerging Regions Architectural Coatings Summary

- Asia-Pacific growth potential remains high
- Latin American demand likely to remain mixed by country
- Brand importance increasing
- Consolidation likely, especially in very fragmented markets such as China
- PPG has a very minor architectural coatings presence in emerging region countries; Acquisitions the lowest risk growth avenue





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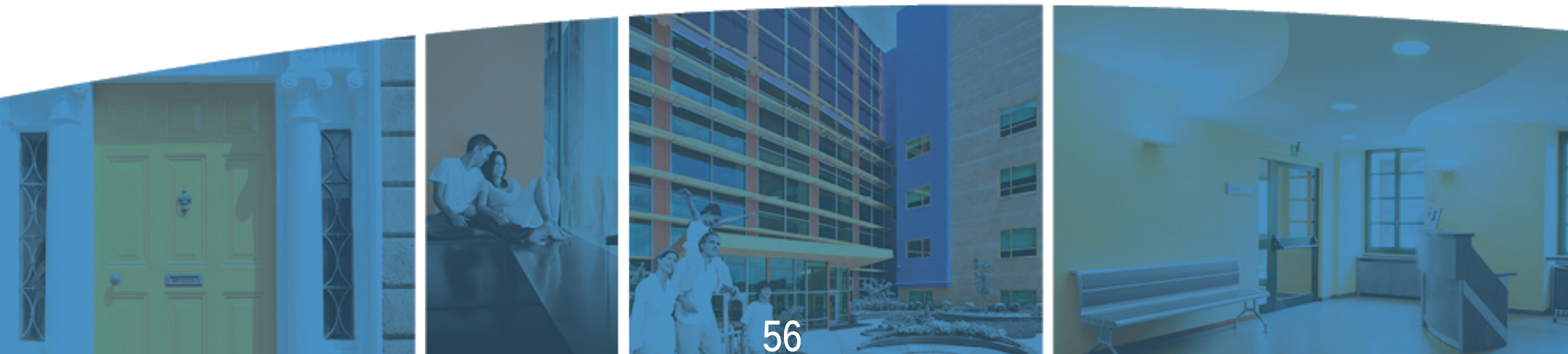
Regional Overview
North America Architectural Coatings

Scott Sinetar
Vice President – Architectural Coatings North America



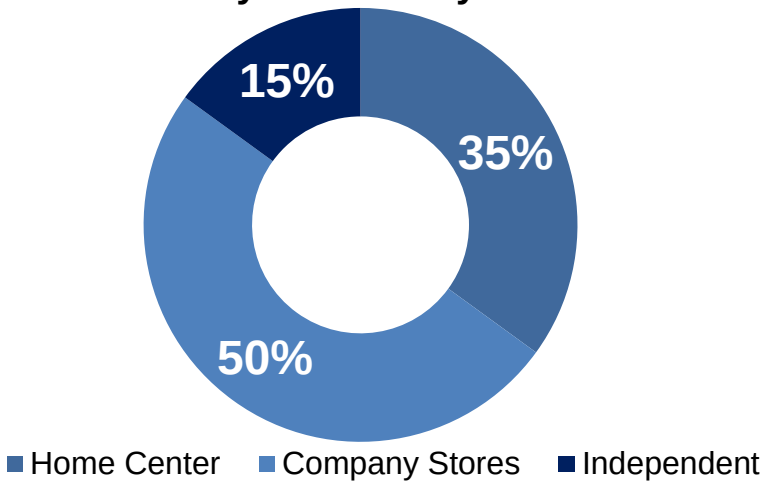
Industry Details – U.S. and Canada

Key Geographies

- US
  - Northeast
  - Southeast
  - Southwest
  - West
- Canada
- Puerto Rico



Industry Revenue by Channel



Regional Industry Characteristics

- Very distinct distribution channels
- Consolidation over time, accelerated the past decade
- Focus on product uniqueness and branding

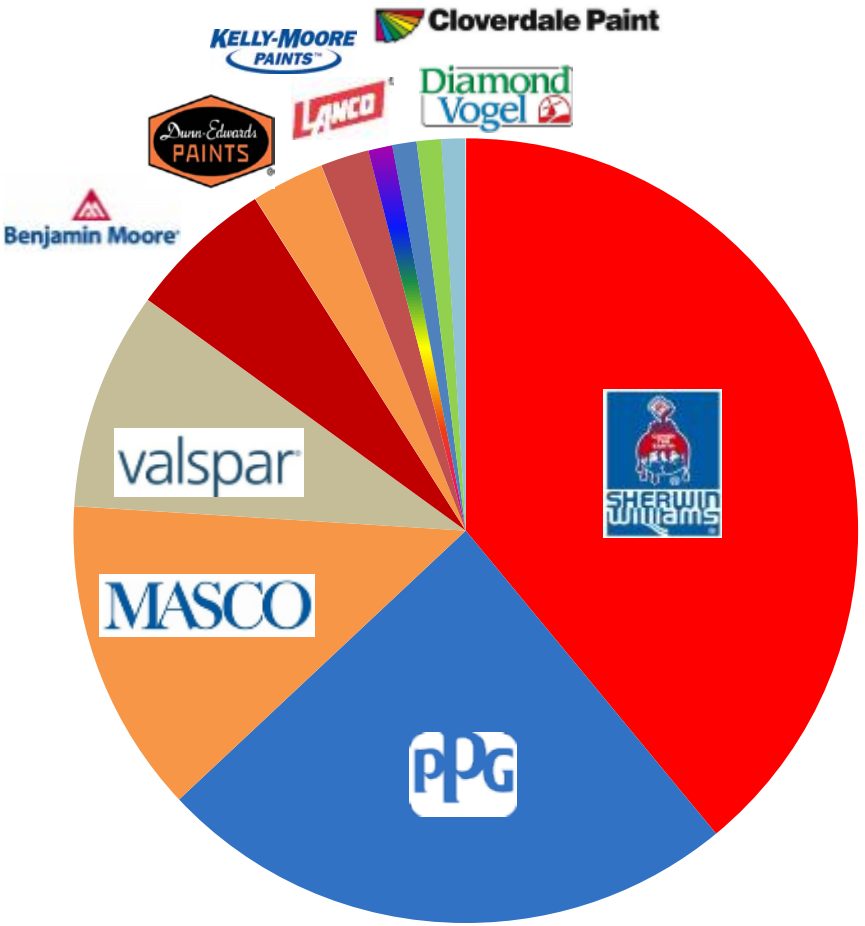
Outlook

- US housing; continuing volume recovery
- Commercial construction currently at recession activity level
- Canadian demand generally stable

Source: PPG Estimates

U.S. and Canada Architectural Coatings

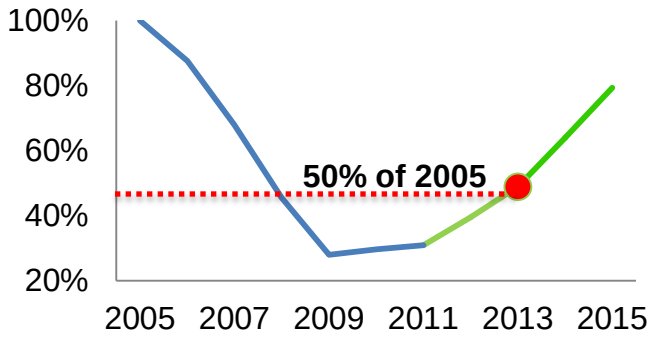
- Remains somewhat fragmented despite consolidation
- Only PPG is a major participant in all 3 channels
- Most other competitors sell vast majority through a single distribution channel
- Competitive set differs by channel and country



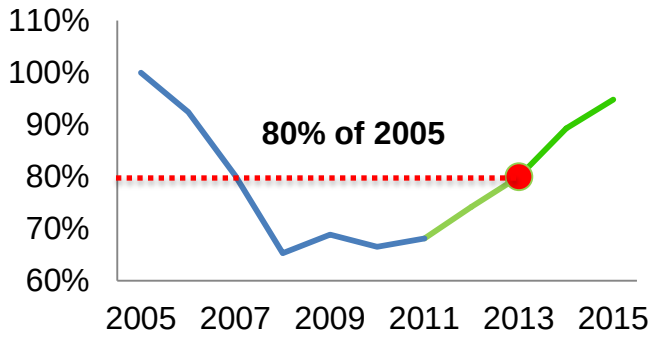
Source: Company Reports, PPG estimates

U.S. Architectural Coatings Demand Drivers

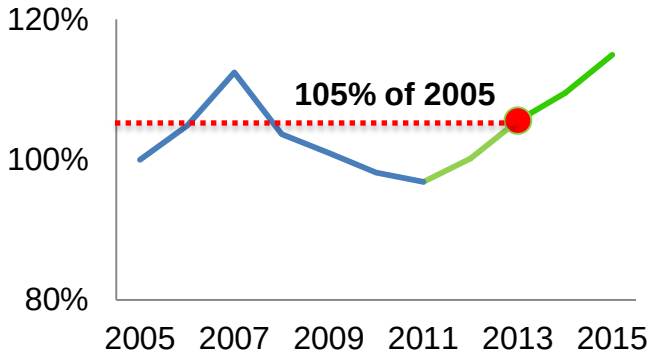
Housing Starts



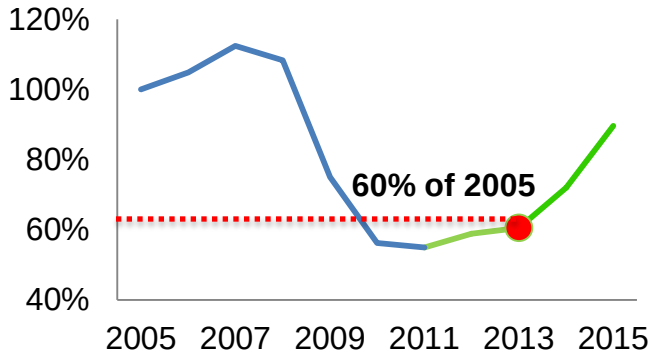
Existing Home Sales



Residential Improvements



Commercial Construction



Recovery in progress - Industry volumes still down ~15%

Source: United States Census Bureau Source: Global Insights

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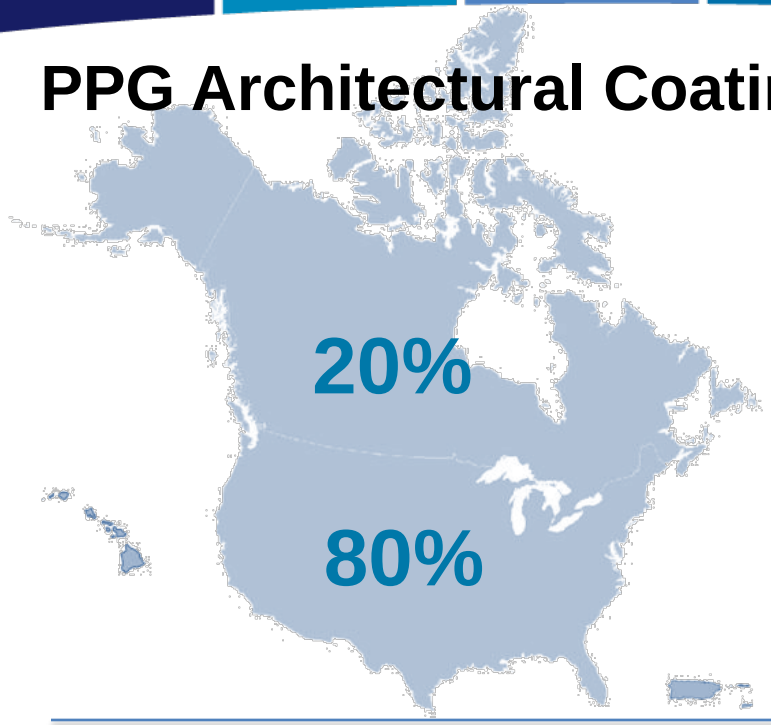
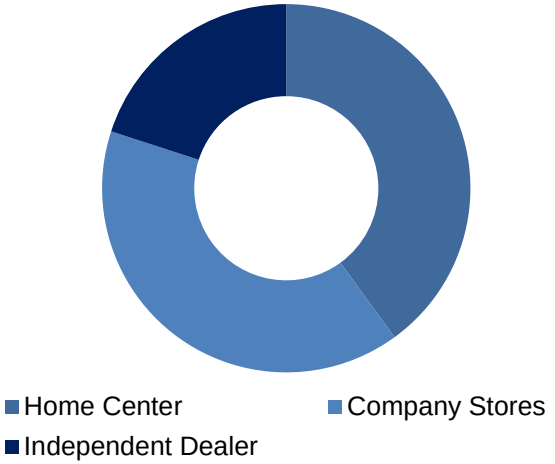
PPG Architectural Coatings – U.S. and Canada



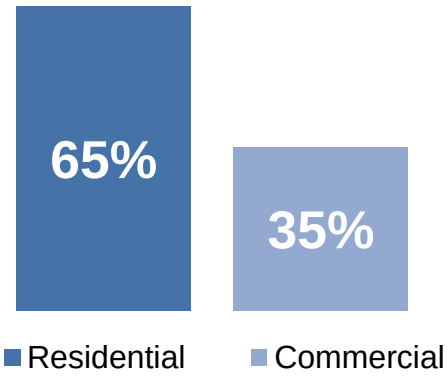
Distribution Channel Position

Channel	Position
Home Centers	#2
Independent Distributors	#2
Company-Owned Stores	#2

Channel Mix - Revenue



End-Use Mix - Revenue



N.A. Architectural Coatings Acquisition Update

Integration and synergy capture ahead of schedule

- **Synergies at or above target**
  - Administration and support
  - Supply chain and logistical enhancements
  - Store realignment
  - Manufacturing optimization
- **Brand strategy underway**
- **Synergies remaining:**

	Original Estimate	Updated/ Current
Day 1 Synergies	$60MM	$60MM
Full impact of Synergies (2015)	$160MM	$200MM

Exit of duplicate headquarters	• 3rd Quarter 2014
Consolidate R&D laboratories	• 3rd Quarter 2014
Back office consistency	• 3rd Quarter 2014
Further supply chain optimization	• 4th Quarter 2014
Complexity reduction	• 1st Quarter 2015

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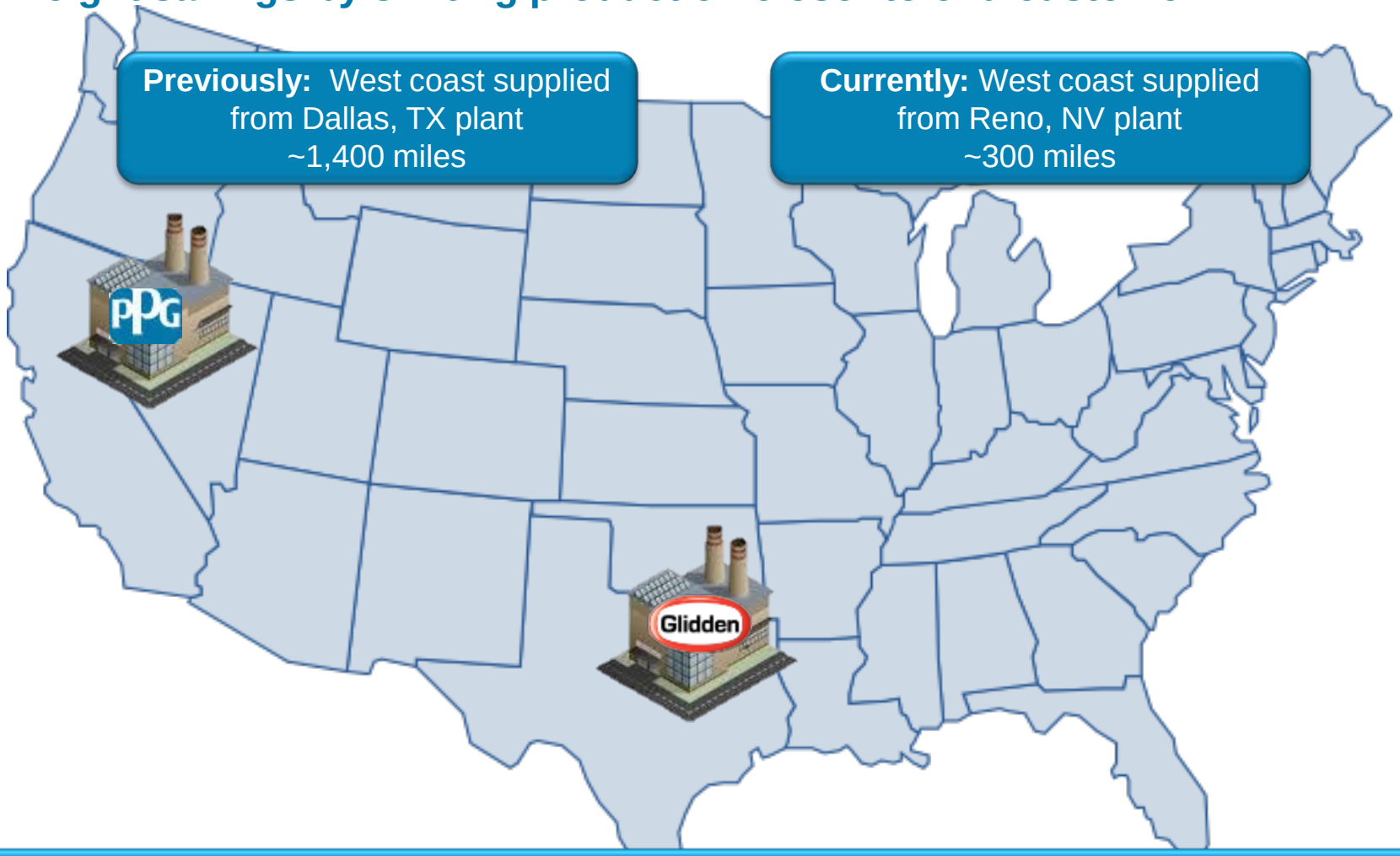
Example of Supply Chain Optimization

Freight savings by shifting production closer to end customer

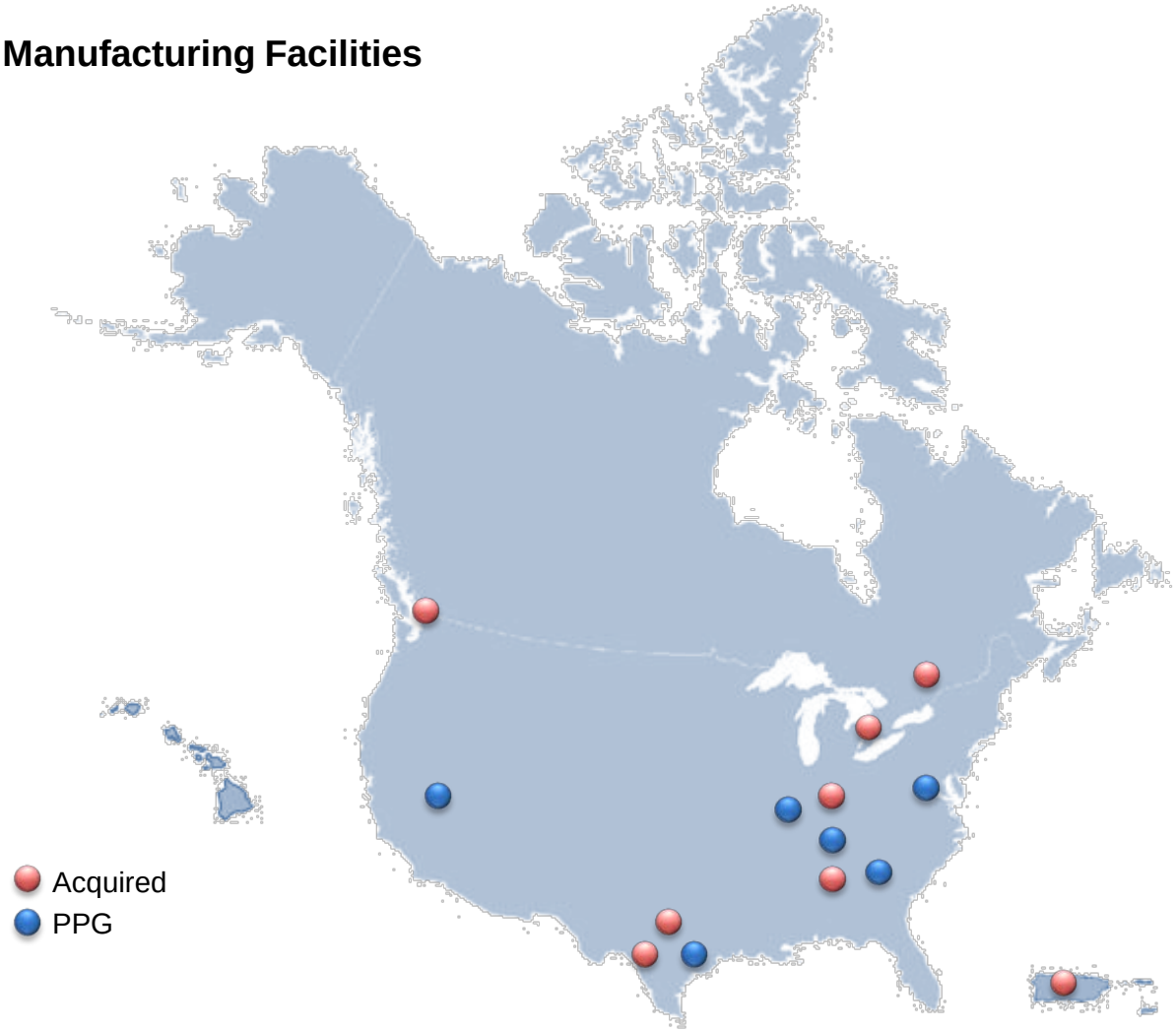


Production optimization reduces transportation/logistics costs

PPG Architectural Coatings

Flexible and robust supply network

Manufacturing Facilities



United States and Canada

Batavia, IL

Beauport, QC

Carolina, PR

Carrollton, TX

Delta, BC

Dover, DE

East Point, GA

Houston, TX

Huron, OH

Louisville, KY

Oakwood, GA

Reno, NV

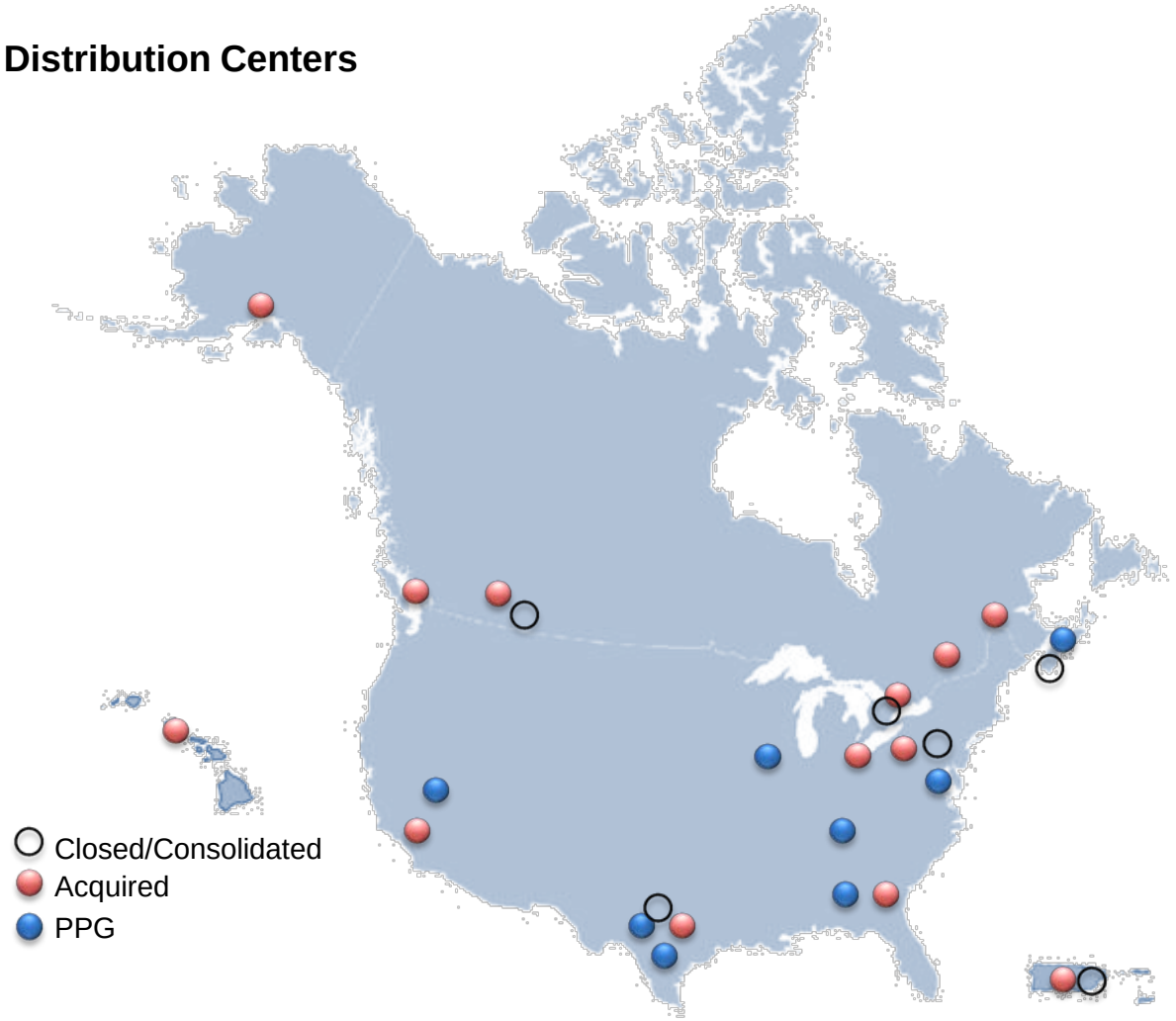
Temple, TX

Vaughn, ON

PPG Architectural Coatings

Optimized distribution following acquisition

Distribution Centers



United States

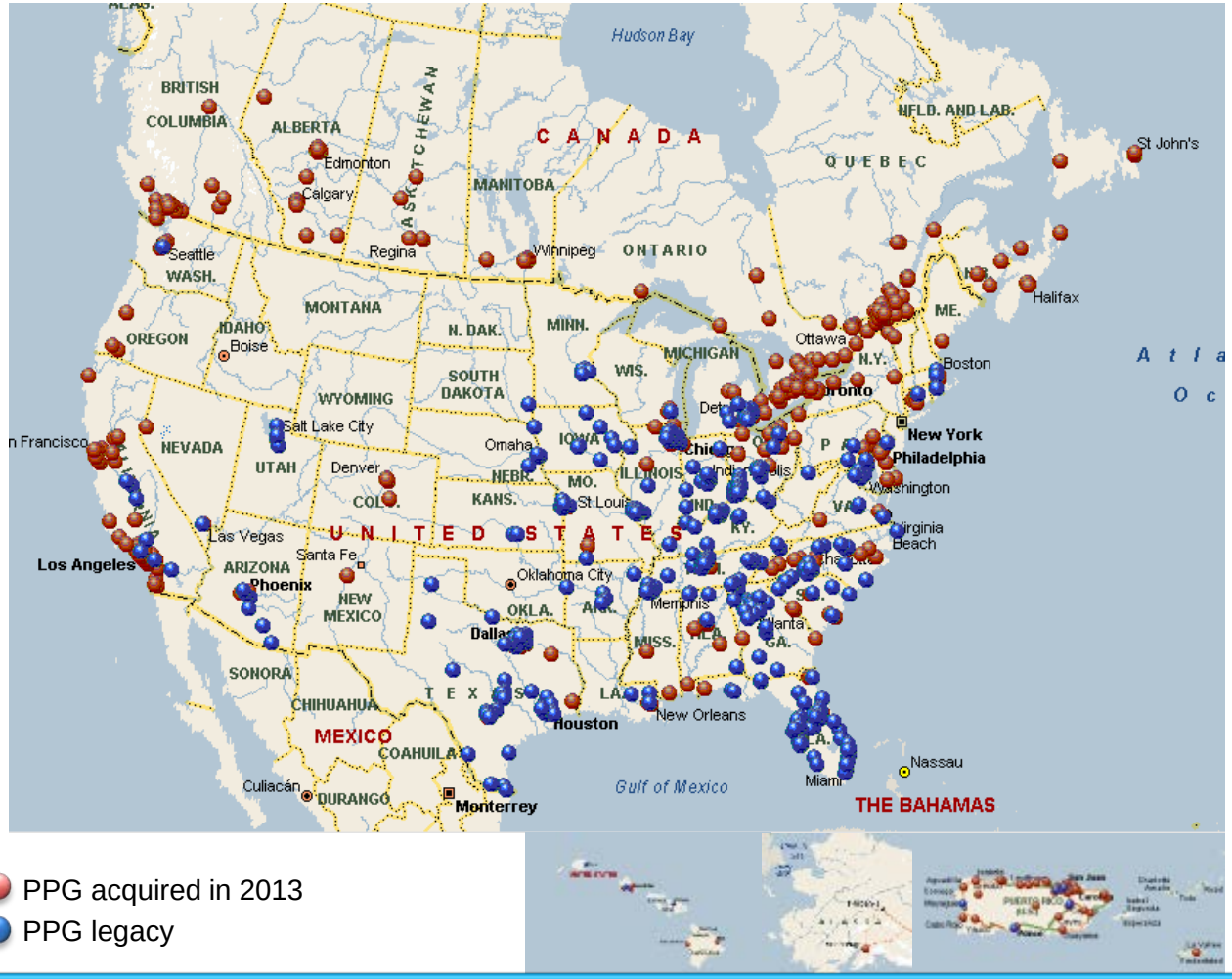
Anchorage, AK
Riverside, CA
Dover, DE
Fairburn, GA
Oakwood, GA
Oahu, HI
Aurora, IL
Louisville, KY
Reno, NV
Huron OH
Reading, PA
Carolina , PR
Carrollton, TX
Houston, TX
Lewisville, TX

Canada

Calgary, AB
Delta, BC
Moncton, NB
Dartmouth, NS
Toronto, ON
Montreal, QC

PPG Company-Owned Stores – U.S. and Canada

Expanded footprint to serve professional painters



- PPG acquired in 2013
- PPG legacy

Acquisition provided complementary footprint and expanded distribution

PPG Company-Owned Stores	
2011	390
2012	400
2013	900

Projected New Stores	
2014	40-50
2015	60-70
2016	80-100

Acquisition-related store rationalization complete – Focus now on expansion

Robust Brand Portfolio – Post Acquisition

Channel	Brands
The Home Depot	
Walmart	
Lowe's	
Menards	
US Stores	
Canada Stores	
Caribbean Stores	
US Dealer/Retail	
Can. Dealer/Retail	

PPG U.S. and Canada Customer Touch Points

Strong commitment to multi-channel distribution

Distribution Channel	Points of Sale (POS)	POS Ranking
Company-Owned Stores	~900	#2
National Home Centers	~8,000	#1
Independent Dealers	~6,000	#2
Total Customer Touch Points	~15,000	#1

Broad customer coverage through all major distribution channels

Source: PPG Estimates

National Home Centers

Coatings remains an important sales category for home centers











PPG sales to home centers

Wide Offering of

Decorative Paint

Leader in

Stains

Leveraging

Adhesives and Sealants

PAINT REPRESENTS

7-9%

OF HOME CENTER SALES

Paint drives foot traffic and is a profitable category for home centers

Source: Lowes/THD Annual Reports

PPG Introducing New Products in Home Centers

Major new product introductions since acquisition

LOWE'S



THE HOME DEPOT



PPG Introducing New Products in Home Centers

New products available at The Home Depot focused on professional

TOPCOATS









SPECIALTY









PPG Wood Care Brands, Products and Distribution

Broad product offering, well known brands

Brands
Array of trusted brands known for their specialization in the wood care category

Products
A wide range of leading interior, and exterior stains, lacquers & prep products

Distribution
Broad footprint of retail and professional distribution across North America



Opportunity to grow – U.S. & Canada market size is ~$1.5B

Source: PPG Estimates

PPG Sealants and Adhesives

Leveraging our breadth of distribution

LIQUID NAILS BRAND

- Strong brand awareness
- Wide range of VOC compliant, Greenguard certified

LOWE'S · THE HOME DEPOT · Do it Best · MENARDS · Walmart · ACE · True Value

MULCO



Leader in Canadian caulks and sealants

High-technology product to meet retail and industrial needs

PPG TOP GUN



High quality line of caulks and sealants

Leverages expanded distribution through PPG stores and dealers

New Products: Meet customer needs with VOC compliant solutions



- Bonds in Extreme temperatures (22º – 120º)
- 200% stronger than fasteners alone



- Bubble free even on porous substrates
- Flexible and easy to tool



- Interior/Exterior formula
- Strong and flexible instant hold

Innovative, extended product offering and expanded distribution

End Use Consumer Orientation by Segment

PPG supplier to DIY and professional painters

DIY Focus

Professional Focus

National Big Box

Independent Dealer

Company-Owned Stores





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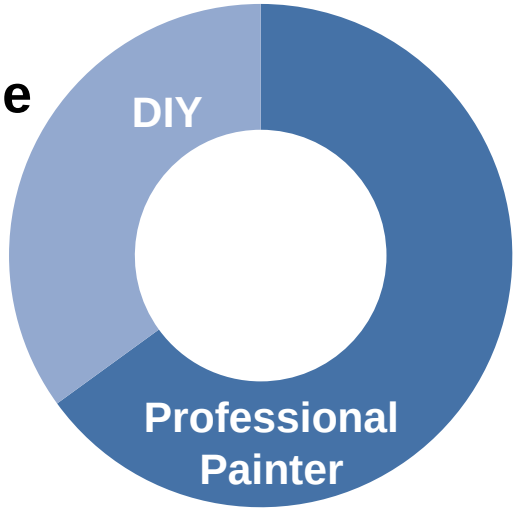
Independent Dealer Channel

Dealer Attributes

- 10,000 + locations in USCA
- Range from hardware stores to dedicated paint stores
- Vary in size from single store to 35 locations

End Use



Offering

- Service
- Location
- Product
  - Multiple supplier brands
  - Range of decorative -to-protective coatings
- Some offer interior design services

Coatings Suppliers

- Benjamin Moore
- PPG
- Valspar
- Pratt and Lambert (Sherwin-Williams)
- California

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Independent Dealers Remain a Key Channel

Channel supplies both DIY and professional



Dealers



Home Centers → **Company-Owned Stores**

Our strategy is to be the partner of choice

- **Supply 6,000 dealer locations**
- **PPG provides key products, brands, and professional programs**
- **Preferred acquirer of choice for those without succession plans**

We Continue to Invest in this Channel

PPG's recent investment in The Coatings Alliance

Equity Interest

Ownership stake forms long-term strategic relationship

Manufacturing

PPG captures exclusive tolling agreement



Product

Super premium brand to supplement PPG's independent dealer product offering

Growth

PPG brings access to extensive dealer network and sales team

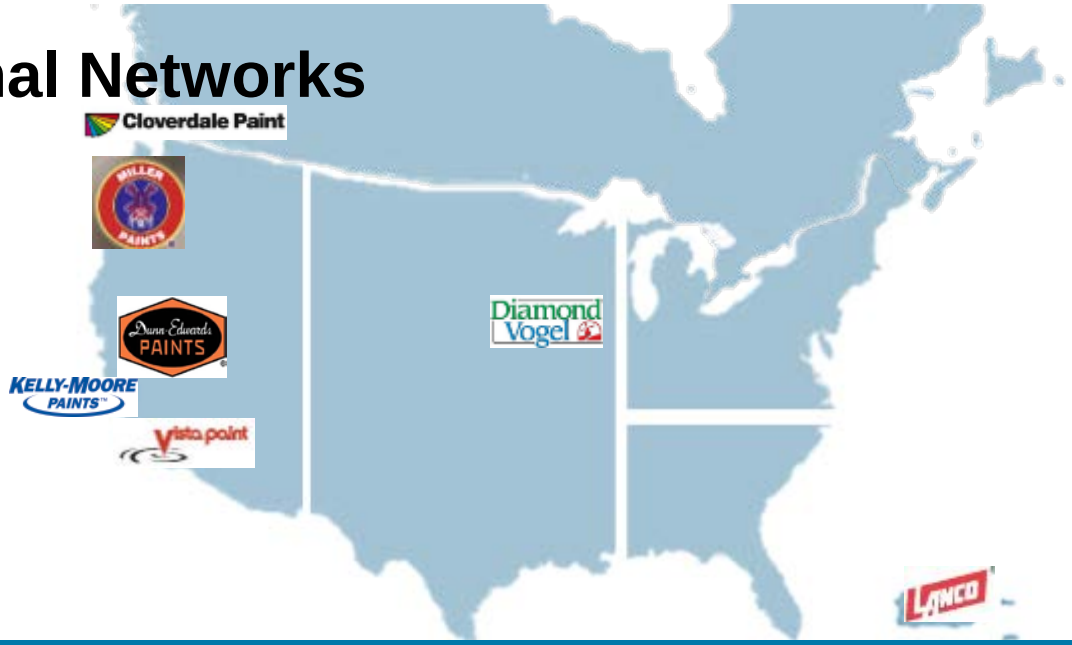
U.S. Trade Channels - Branding Strategy

CURRENT	FUTURE
U.S. Company-Owned Stores	
PPG PPG PITTSBURGH PAINTS Glidden PPG PORTER PAINTS	PPG
U.S. Independent Dealers	
PPG PPG PITTSBURGH PAINTS Glidden Devoe Paint PPG PORTER PAINTS	PPG PITTSBURGH PAINTS

Company-Owned Stores Competitive Landscape

Nationwide Stores

Regional Networks



PPG is a leader in Canada with a solid #2 position in the United States

Chart includes only major competitors, does not include independents

PPG Company-Owned Stores – Key Figures



- 1,000 customers/store
- 5,000 square feet/store
- 40 states/providences



Tinting
Showroom
Inventory
- Powders
- PMC
- Light Industrial
- Architectural

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Other PPG Products



PPG Light Industrial



PPG Powder Coatings



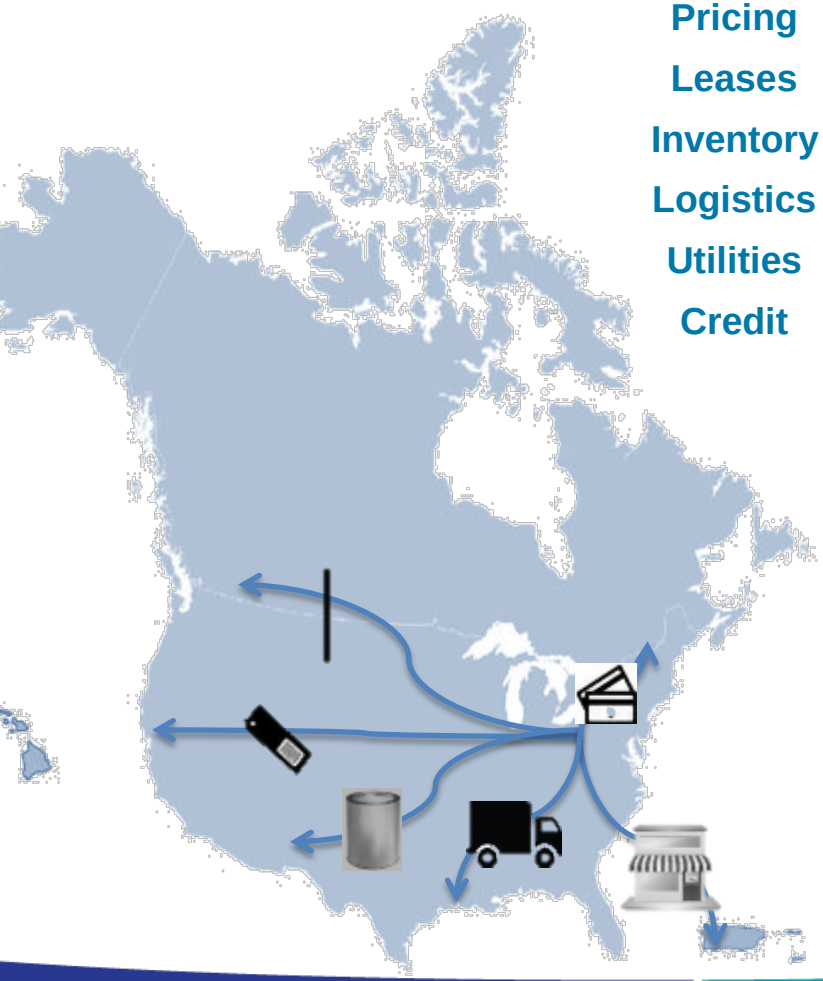
PPG Protective and Marine



Sundries and Accessories

Operationally Effective in Driving Efficiencies

Centrally Managed Activities



- Pricing
- Leases
- Inventory
- Logistics
- Utilities
- Credit

Robust Support Network Surround Stores



Operations

- Store Group Manager
- Director of Store Operations
- Vice President of Stores

Sales Support

- Account Development
- Regional Sales
- Zone Sales

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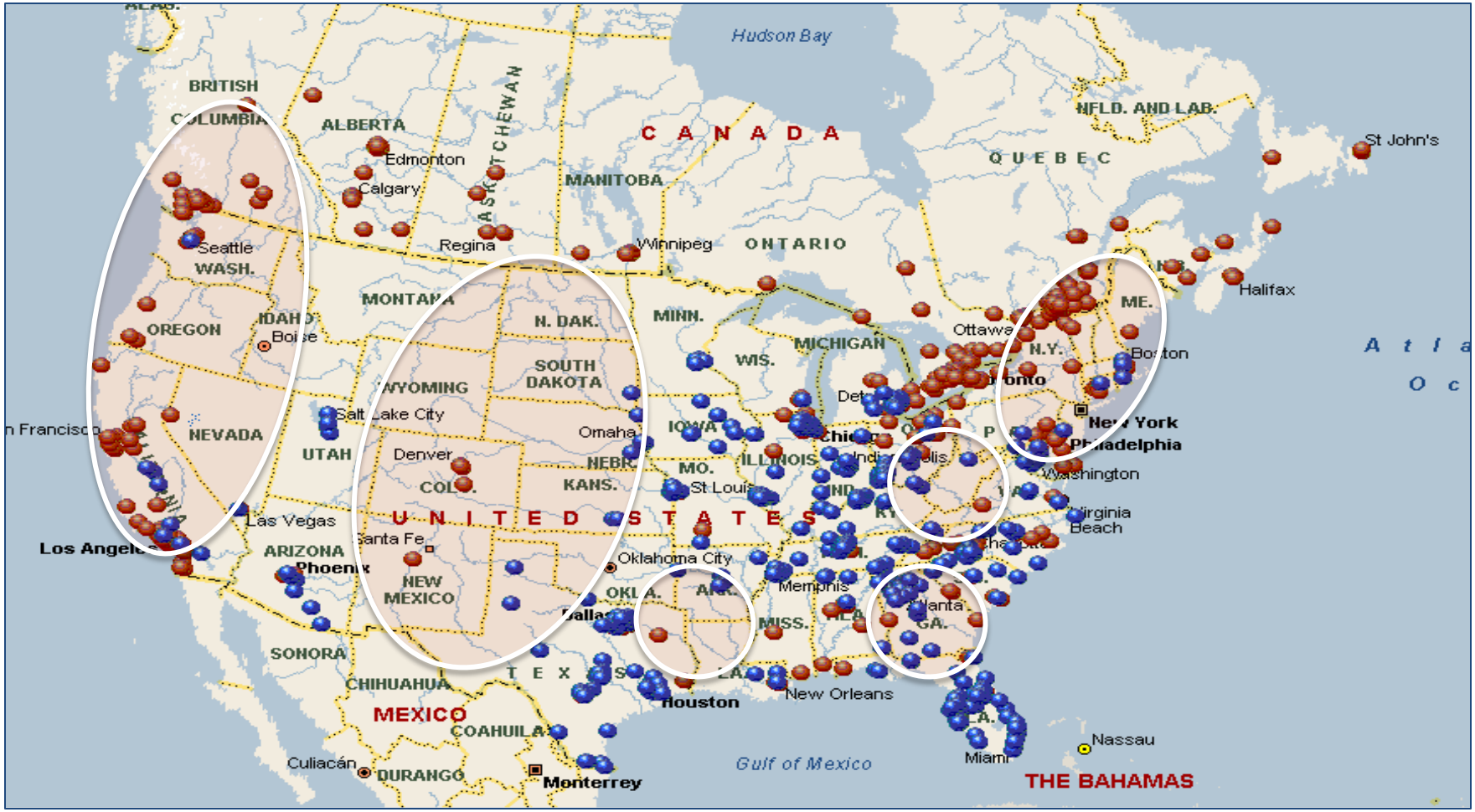
PPG Store Network has Room to Grow

Room for expansion without cannibalization



Shaded areas represent notable PPG growth opportunities

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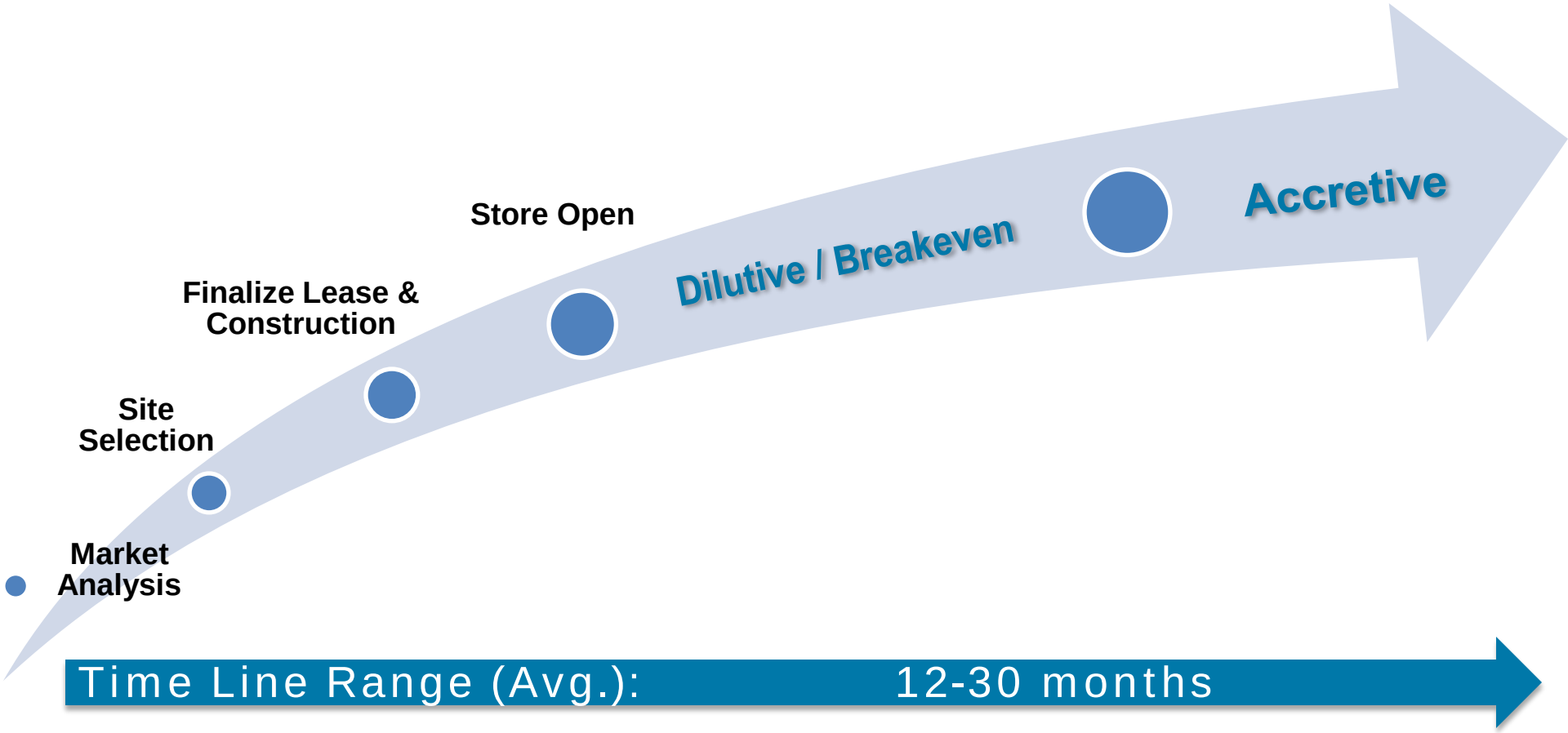
Continued Focus on Store Network Growth

Anticipated store growth – 50 -to- 100 additions per year



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PPG Company-Owned Store Network

Positioned to serve the professional painter



PPG Customer Orientation

PPG provides services and product offering for all of the unique end uses of the professional painter:

- Commercial new and remodel/repaint
- Multi-family new and remodel/repaint
- New home construction
- Residential repaint
- Industrial
- Protective coatings



PPG's store strategy is to focus primarily on the professional painter

✓ **Requires less store density**

Professional painters utilize delivery and require fewer stores

✓ **Lower lease costs**

Highly visible retail locations are not required by professional painters

✓ **Fewer DIY-related resource demands due to customer mix**

More focus on pro needs, specifications, technical education, and high volume accounts

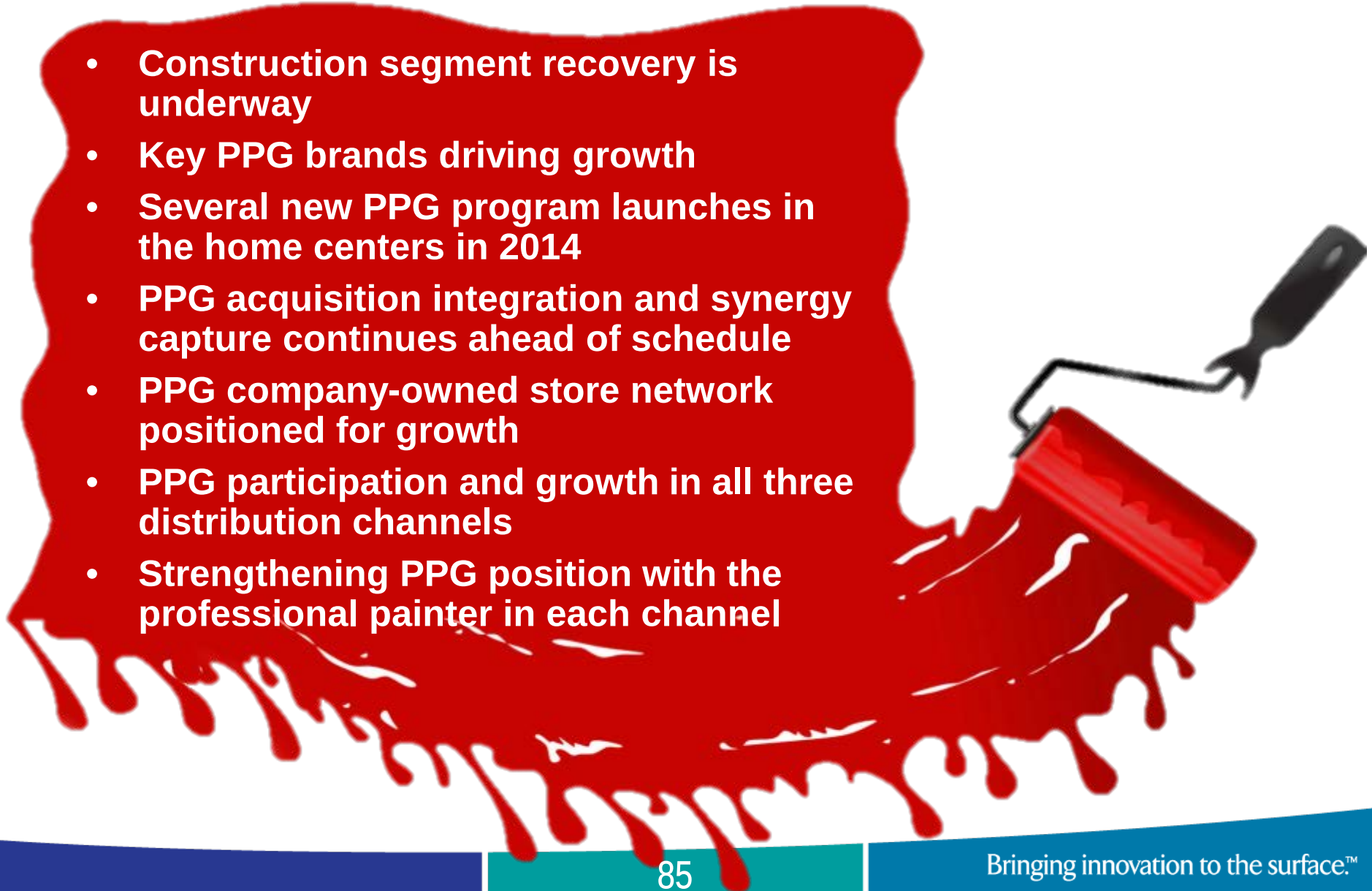
✓ **Maintaining high customer retention**

Technical expertise and commercial servicing programs foster strong customer relationships

Focus on paint professionals requires fewer stores, lowering cost to serve

U.S. and Canada Summary

- Construction segment recovery is underway
- Key PPG brands driving growth
- Several new PPG program launches in the home centers in 2014
- PPG acquisition integration and synergy capture continues ahead of schedule
- PPG company-owned store network positioned for growth
- PPG participation and growth in all three distribution channels
- Strengthening PPG position with the professional painter in each channel



Presentation Summary

- **Architectural coatings remains an attractive and expanding global focus**
  - Demand recovery underway in developed regions
  - Varied growth prospects remain in emerging regions

- **Regional differences remain the industry norm**
  - Local preferences will continue drive structural market differences
  - Consolidating industry but remains fragmented with various local and regional coatings participants
  - Distribution channel evolution continues

- **Architectural coatings attributes continue to improve**
  - Well regarded regional brands will remain prominent
  - Continued adoption of new coatings technologies

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PPG Global Architectural Strategy

- **Continued expansion of PPG's global architectural coatings platform**
  - Organic growth and opportunistic acquisitions in developed regions
  - Primarily acquisition-related growth in emerging regions

- **Maintain distribution channel diversity; Optimize well established PPG brands**
  - Match distribution approach with regional preferences, providing maximum access to all customers
  - Enhance regional brand support and recognition

- **Maximize financial results**
  - Secure remaining N.A. acquisition synergies
  - Apply scale advantages from PPG's global breadth, technology and unrivaled participation in all coatings end-use markets

Walk of the Day

Company-owned store (PPG)

- Broad product capabilities
- Distinct areas for:
  - Architectural
  - Commercial support area
  - Protective
  - Light industrial (True Finish)
- Regional delivery system based out of store

Company-owned store (Glidden)

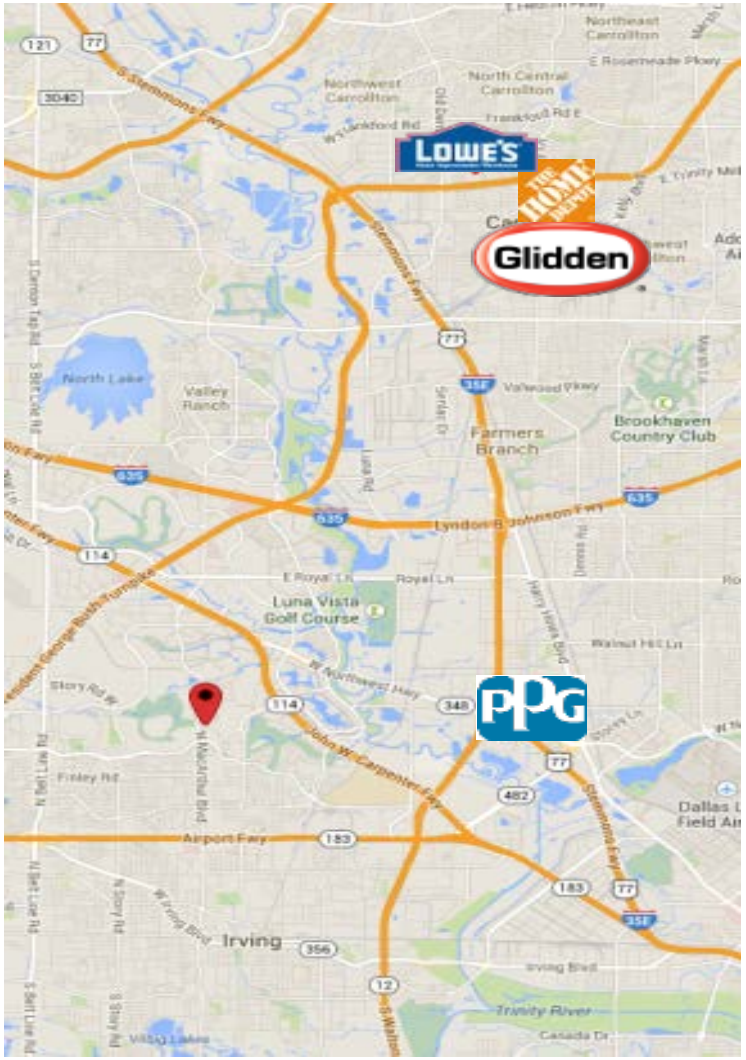
- Set for rebranding in 3Q14
- Dual tint capability (Glidden Professional and PPG)
- Primary focus is multi-family segment

The Home Depot

- New Glidden Professional program
- New Glidden Premium program
- Adhesives and Sealants
- Ralph Lauren

Lowes

- Elite Stain
- Rescue It!



Appendix



PPG Architectural Coatings Unveils U.S. Brand Strategy to Better Serve the Professional Customer

PITTSBURGH--(BUSINESS WIRE)--Apr. 23, 2014-- In an effort to maximize its position to serve the professional customer, PPG Industries' (NYSE:PPG) architectural coatings business announced a comprehensive pro brand strategy in the U.S. that will leverage its brand assets in three key channels of paint distribution. The strategy includes the rebranding of its U.S. company-owned paint stores, an expanded brand and product offering through independent paint dealers, and the expansion of a pro customer program at The Home Depot. With these initiatives, PPG underscores its unique position as the only company with a major presence in all three distribution channels capable of supplying to the professional contractor.

"The professional customer represents approximately 60 percent of the paint purchased and applied in the United States and is an extremely important part of our business," said Scott Sinetar, PPG vice president, architectural coatings, North America. "We pride ourselves on being the best in the industry at meeting the needs of the pro, and this clarified brand alignment helps us demonstrate that position."

Sinetar continued, "We want to effectively reach all types of professional customers regardless of where they live and where they want to buy their paint." With more than 600 PPG company-owned paint stores, 5,000 independent dealer locations and 2,000 home center outlets, PPG offers more distribution options for the professional across the United States than any other paint manufacturer.

- **PPG Company-Owned Stores – Leveraging the Power of the PPG Brand**: All 600+ U.S. PPG company-owned stores currently operating under the PPG PITTSBURGH PAINTS®, PPG PORTER PAINTS® and GLIDDEN PROFESSIONAL® brands will be rebranded under a newly developed PPG® Paints brand by the fall of 2014. "The new PPG Paints brand will enable us to leverage the equity of the PPG brand to establish one, unified store footprint from the Atlantic to the Pacific," said Tom Dougherty, PPG director of pro marketing, architectural coatings. "This will enable us to focus our marketing investment in one brand that is recognized by all pro audiences anywhere in the country. This is important, as many professional painters and project specifiers cross state and regional lines. We want them to know that regardless of where their next project may be, they can count on PPG Paints to be there to help them get it done." Dougherty added that the PPG Paints brand will also be available for independent dealers that want to leverage the power of PPG to reach professional customers.
- **Independent Dealers – More Brands, More Products, and More Opportunities than Ever Before:** The 2013 acquisition of AkzoNobel's North American decorative coatings business significantly enhanced PPG's stable of brands available to serve the pro through the independent dealer network, and it made possible the creation of a new, dealer-exclusive brand that will combine the heritage of the PPG Pittsburgh Paints and DEVOE® brands. The completely new PPG Pittsburgh Paints brand, which will launch in late 2014, will incorporate some of the best-known Devoe paint sub-brands under the PPG Pittsburgh Paints parent brand and be available to professional customers only through independent dealers. "The uniting of the strong equities of the PPG Pittsburgh Paints and Devoe Paints brands into this completely redesigned brand offers a powerful option to dealers who want to support a brand that will not be in company stores and home centers," said Dougherty. "We're really excited to be able to offer this option to our dealers as one of many in our portfolio."

  In addition to the soon to be re-launched PPG Paints and PPG Pittsburgh Paints brands, the other strong brand options from PPG for independent dealers include the PPG Porter Paints and GLIDDEN® brands. Finally, a recent PPG acquisition of a minority equity stake in The Coatings Alliance enables the company to add the super-premium C2®Paint brand to its industry-leading dealer portfolio.

  "Simply put, the independent dealer is a critical component of our strategy to reach the professional customer, and we are really proud to be able to work with our dealers to offer many options," said Dougherty.

- **Home Center – Expanding Options for the Pro:** PPG and The Home Depot will work more closely together to grow pro paint sales through the world's largest home center by leveraging the Glidden Professional brand. An expanded Glidden Professional product presence in stores will be supported with joint marketing and sales efforts to build the pro business with this key customer beginning in May.

"It's truly an exciting time to be a part of PPG, a company that has a strong heritage in quality, durability, performance and serving the professional customer," said Sinetar. "We are confident these strategic moves and brand enhancements put us in a position to serve the pro better than ever. Our well-respected brands and products, knowledgeable workforce and unmatched distribution opportunities are a good formula for success for us and our customers."

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PPG Attendee Bios



Michael H. McGarry

Executive Vice President

Michael H. McGarry is executive vice president of PPG Industries. He is a member of the company's executive and operating committees and oversees its architectural coatings, flat glass, and protective and marine coatings businesses; the Europe, Middle East and Africa (EMEA) region; and its corporate environment, health and safety (EHS), information technology (IT) and quality functions.

He joined PPG in 1981 as an engineer at the company's Lake Charles, La., chemicals complex. McGarry then progressed through a series of management assignments, including market development manager, silica products; operations manager, silicas, Thailand; business manager, TESLIN® sheet; and product manager in the derivatives, chlorine, liquid and dry caustic soda businesses.

He was named general manager, fine chemicals, in 2000 and vice president, chlor-alkali and derivatives, in 2004. McGarry was elected vice president, coatings, Europe, and managing director, PPG Europe, in 2006 and senior vice president, Commodity Chemicals, in 2008. He was named executive vice president in September 2012 with responsibility for the automotive refinish and aerospace businesses and the Asia Pacific region, and he assumed his current role in February 2013.

McGarry additionally serves as a director on the board of Axiall Corporation (NYSE:AXLL), and on the board of Pittsburgh Glass Works LLC, in which PPG holds a minority interest.

A native of New Orleans, McGarry is a mechanical engineering graduate of the University of Texas and completed the Advanced Management Program at Harvard Business School.

PPG Attendee Bios



Frank S. Sklarsky

Executive Vice President and Chief Financial Officer

Frank S. Sklarsky is executive vice president and chief financial officer of PPG Industries.

He joined PPG as executive vice president, finance, in April 2013 and was named to his current role in August 2013. Sklarsky serves on PPG's executive and operating committees.

Prior to joining PPG, Sklarsky was executive vice president and chief financial officer, Tyco International, Ltd., a global provider of security, fire protection and flow control solutions. After starting his career with Ernst & Young and holding finance positions with Dell, Inc., he spent 20 years with Chrysler in a series of senior financial leadership roles. Sklarsky then served as executive vice president and chief financial officer at both Eastman Kodak Co. and ConAgra Foods, Inc., before joining Tyco.

Sklarsky earned a bachelor's degree in accounting from Rochester Institute of Technology and an MBA from Harvard Business School, and he is a certified public accountant. He is a member of the board of directors of Harman International Industries, Inc., and of Rochester Institute of Technology.

PPG Attendee Bios



Scott Sinetar

Vice President, Architectural Coatings, North America

Scott Sinetar is vice president, architectural coatings, North America, for PPG Industries.

He joined PPG's architectural coatings business in 1989 during the acquisition of OLYMPIC® paints and stains. Sinetar moved to the company's Pittsburgh headquarters that year as manager, national accounts, and then became national sales manager in 1991, director of sales in 1996, and general manager, architectural coatings, in 2001. He was named to his current position in early 2006.

Prior to the acquisition, Sinetar was an area manager in New Jersey and a region manager in Atlanta for Olympic paints and stains, and he had been assistant general manager based in New Jersey for American Frozen Foods.

A native of Bethpage, N.Y., Sinetar earned a bachelor's in business administration from Monmouth University and completed executive education at Carnegie Mellon University.

PPG Attendee Bios



Tom Maziarz

Vice President, Stores and Dealers, Architectural Coatings, North America

Thomas E. Maziarz is vice president, stores and dealers, architectural coatings, North America, for PPG Industries.

He joined PPG's architectural coatings business in 1993 as a sales representative and was soon promoted into account management. In 2000, Maziarz became PPG's national sales manager for Lowe's. He moved to PPG's former insurance and services business in 2003 as director of sales and market development for LYNX Services. Maziarz returned to architectural coatings in 2007 as zone sales director for the central zone, and was named general manager for the company stores and independent dealer group in 2009. He was named to his current position in 2013.

Maziarz earned a bachelor's degree in industrial engineering from The Pennsylvania State University and a Master of Business Administration degree from the University of Pittsburgh's Joseph M. Katz Graduate School of Business.

PPG Attendee Bios



John Stephenson

Business Controller, Global Architectural Coatings and Glass

John M. Stephenson is business controller, global architectural coatings, protective and marine coatings, and glass, for PPG Industries.

He joined PPG as cost accounting analyst for the Lake Charles, La., chemicals complex in 1985, and then moved to Pittsburgh as financial analyst – corporate in 1988. Stephenson became cost accounting supervisor – chemicals at the chemicals facility in Natrium, W.Va., in 1992. He then returned to Pittsburgh and served as manager, financial reporting – coatings; manager, corporate financial analysis; director of finance, fiber glass; and director of finance and development, automotive coatings, before being named PPG general auditor in 2002.

Stephenson was named business controller – coatings and global director, finance – industrial coatings, in 2008, and he assumed his current role in 2011.

A native of West Bend, Wis., Stephenson earned an undergraduate degree in business administration from the University of Wisconsin and a Master of Business Administration from the University of Pittsburgh Joseph M. Katz Graduate School of Business.

PPG Attendee Bios



Vincent J. Morales

Vice President, Investor Relations

Vince Morales is vice president, investor relations, for PPG Industries.

Morales joined PPG in the corporate controller's office, Pittsburgh headquarters, in 1985. Progressive finance and accounting assignments with PPG facilities included supervisor, shared accounting services, in Chillicothe, Ohio, and director, information and financial services, in Mt. Zion, Ill.

Morales returned to Pittsburgh in 2000 as manager, chemical revenue recognition, then became director, internal financial reporting, in 2001. He was named director, investor relations, in November 2004 and to his current position in October 2007.

A native of Pittsburgh, Morales earned a bachelor's degree in accounting from Robert Morris University and a Master of Business Administration degree from the Ohio State University.

EBITDA Reconciliation

PPG Architectural Coatings - EMEA

	2013	2012	2011	2010	2009	2008
Sales	$2,062	$2,147	$2,104	$1,874	$1,952	$2,249
Segment Earnings	185	145	123	113	128	141
Depreciation & Amortization	105	115	113	107	109	121
Earnings Before Depreciation & Amortization (EBITDA)	290	260	236	220	237	262
EBITDA % of Sales	14.1%	12.1%	11.2%	11.7%	12.1%	11.6%

Amounts in Millions of USD except percents

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