SOLUTIONS THAT MAKE THE DIFFERENCE
BENTELER AT A GLANCE

BENTELER develops solutions that make the difference - for our customers, employees and society. We are passionate about producing safety-relevant products, services and systems for the energy, automotive and engineering sectors that lead to success. And we do that in close proximity and collaboration with our customers. With our technological expertise and strong focus on successful implementation, we keep our promises.

At BENTELER we give our all – with courage, ambition and respect – but we never give up.

BENTELER. THE FAMILY OF DRIVEN PROFESSIONALS.
SINCE 1876.
#FAMILY OF DRIVEN PROFESSIONALS
OUR STRUCTURE

BENTELER Group

CORPORATE FUNCTIONS

BENTELER Automotive
- Chassis & Modules
- Structures
- Engine & Exhaust Systems
- Electro-Mobility
- Northern Europe
- Southern Europe
- North America
- Mercosur
- Asia/Pacific

BENTELER Steel/Tube
- Automotive Energy Industry
- Seamless Welded

Divisions | Business Units | Market Segments | Operating Units | Regions
BENTELER AUTOMOTIVE

BENTELER Automotive is the development partner for the world’s leading automobile manufacturers. With around 26,000 employees and more than 70 plants in about 25 countries we develop tailored solutions for our customers. Our products include components and modules for chassis and body, engine and exhaust systems as well as solutions for electric vehicles.

BENTELER makes it happen
BENTELER STEEL/TUBE

BENTELER has been producing steel tubes for more than 100 years, and we are continuing to develop these products further. With this experience we can offer our customers around the world solutions all along the value chain – from material development to tube applications. And beyond.
BENTELER IN NUMBERS

LOCATIONS
100 in 28 countries

SALES 2019
7.713 € bn.

EMPLOYEES
about 30,000

IN DIVISIONS
Automotive 86 %
Steel/Tube 14 %
BENTELER GROUP – WHERE WE COME FROM

COURAGE. AMBITION. RESPECT. SINCE 1876.

- **1876**: Carl Benteler opens an ironmongery store in Bielefeld, Germany
- **1916**: Purchase of an engineering plant, two years later start of tube production
- **1935**: First major order for the automotive industry
- **1980**: First plant of BENTELER Automotive in the US
- **2002**: First plant of BENTELER Automotive in China
- **2015**: BENTELER Steel/Tube opens its first US-based tube plant in Shreveport, Louisiana
- **2018**: BENTELER opens its 5th plant in Klášterec nad Ohří, Czech Republic, and its 15th plant in Chongqing, China
- **2010**: Foundation of BENTELER International AG, Salzburg, Austria
- **2017**: BENTELER Automotive founds Business Unit “E-Mobility”
- **2019**: BENTELER introduces the BENTELER Electric Drive System 2.0 - a series-ready platform solution for electric vehicles
"In the past 20 years BENTELER has grown from a medium-sized German company into a global enterprise. Processes and structures have to adapt. What has persisted, is our mindset. The way we approach something. Namely with courage, ambition, and respect."

RALF GÖTTEL
CHIEF EXECUTIVE OFFICER
OUR 2022 STRATEGY

Our 2022 strategy is based on three pillars:

- Continued consistent development of the core business
- Growth focused on future technologies and markets
- Performance-based corporate culture
BENTELER has wide expertise in materials, which we deploy to meet individual customer requirements – from exclusive niche products to large-scale series production.

As an international group we concentrate on the latter.
TARGETED GROWTH

We target our investments where they hold most promise over the long term. For the Automotive Division e-mobility offers opportunities particularly in China. For the Steel/Tube Division the opportunities are to be found in oil and gas exploration in the USA.

In mature markets we focus on innovative technologies.
BENTELER has always been successful when it has acted with courage, ambition and respect. Our corporate values – courage, ambition and respect – therefore make up the third pillar of our strategy.

They enable BENTELER to be a reliable and at the same time responsive market participant – qualities that will also be important in the future.
WORLDWIDE AND LOCAL

With 84 plants and 16 subsidiaries and trading companies in 28 countries, BENTELER is always at the side of its business partners. Not only in terms of geographical proximity, but also strategically: BENTELER supports its partners from product idea to series production. With many years of experience, with expertise spanning all our Business Divisions, and with a determination to develop the ideal solution.

In short: We are where you need us.
CHINA is the most important growth market for the automotive sector. In 2030 half of all electric vehicles will be produced in China. BENTELER supports customers here with technical expertise and a regional presence. We are represented in all relevant provinces and we regularly open new plants there. So we know both the country and its people. We have been successfully working with our Chinese partners for over 15 years.
The **US** is one of the biggest oil and gas producing countries in the world. Together with BENTELER production is being further expanded: Our high-tech hot rolling mill in the US state of Louisiana is delivering special seamless tube products for the US oil and gas industry.
In **EASTERN EUROPE** BENTELER is also serving the needs of the automotive sector in two ways: with plants in the Czech Republic, the Slovak Republic, Hungary, Russia and Poland, and with our central first-stage processing center. This means we can react even faster to individual customer requirements. And we can do it in close proximity to those customers.
SYSTEMS FOR THE FUTURE

BENTELER cooperates with different partners, like innovation platforms or universities. Because only if you are open to the new, you can continue to develop the best solutions.
<table>
<thead>
<tr>
<th>NEW PLANTS IN 2019</th>
<th>RESEARCH AND DEVELOPMENT</th>
<th>PATENT APPLICATIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 in Spain</td>
<td>95 € million</td>
<td>46</td>
</tr>
<tr>
<td>1 in Brazil</td>
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</table>
The digital shift is changing our world. Long-term only those who welcome this change in an open, active and courageous way will be successful.

And BENTELER is doing just that.

- Digital engineering
- Predictive maintenance
- Smart glasses
- Work 4.0
- Smart production
- Predictive quality
THERE ARE THOUSANDS OF QUESTIONS ON E-MOBILITY. WOULDN’T IT BE GOOD TO HAVE JUST ONE CONTACT PARTNER TO PROVIDE ALL THE ANSWERS?

We run a dedicated e-mobility business unit. Our offer to customers focuses on engineering and program management including licence models. Our offer ranges from battery pack to the complete BENTELER Electric Drive System solution. From concept phase to start of production.
WHY IS THE BENTELER ELECTRIC DRIVE SYSTEM THE OPTIMUM SOLUTION FOR OUR CUSTOMERS?

- A series-ready platform solution for electric vehicles.
- A showcase for our entire technological competence and collaborative approach to development.
- Together with a broad network of strategic partners we develop modular and tailor-made solutions for our customers.

BENTELER makes it happen
CAN YOU MAKE TUBES MORE CORROSION-RESISTANT AND AT THE SAME TIME DO SOMETHING FOR THE ENVIRONMENT?

Zista® Seal, from the Zista® family of products, is a special seal that protects tubes from corrosion, in particular after forming. And it does that entirely without chrome VI – in line with the European REACH regulation.
A COMPANY IS THE SUM OF ALL ITS EMPLOYEES

Only people who are happy and motivated will deliver their best. Encouragement and reward are therefore essential for achieving excellence. And the chance to keep learning plays a big part in company loyalty. All good reasons why BENTELER is offering its 30,000 employees worldwide a range of opportunities to develop their skills.
30,000 GUARANTORS OF SUCCESS

EMPLOYEES
about 30,000

APPRENTICES WORLDWIDE
597

PROFESSIONAL TRAINING
average of 26 hours / employee*

*refers to BENTELER Automotive
WHAT DO REAL ENGINEERING TALENT AND OUTSTANDING EXECUTION COMPETENCE HAVE IN COMMON?

Both are demonstrated in action day to day by BENTELER employees. With our technological expertise and strong focus on successful implementation, we keep our promises. We give our all – with courage, ambition and respect – but we never give up.

BENTELER
makes it happen
BENTELER MAKES IT HAPPEN
WITH A CLEAR CONSCIENCE

BENTELER takes its responsibility to society seriously – and we are happy to do so. That’s also why we develop solutions that make the difference. For our customers, for society and for the environment.
We recycle and reuse about 95% of our total waste.

The BENTELER Automotive plant Kleinenberg, Germany, is connected to the local windpark Asseln in Lichtenau. The plant now covers a large part of its energy needs from wind power – around 80% in 2019.

BENTELER Steel/Tube helps to reduce the weight of cars – this means up to 35% less weight for some components.
THE STRUCTURE OF THE BENTLER GROUP

The BENTLER Group is organized into the Divisions of BENTLER Automotive and BENTLER Steel/Tube. The holding company, BENTLER International AG, is responsible for the global strategic management of the Group.
### BENTELER AUTOMOTIVE IN NUMBERS

<table>
<thead>
<tr>
<th>LOCATIONS</th>
<th>SALES</th>
<th>EMPLOYEES</th>
</tr>
</thead>
<tbody>
<tr>
<td>77 plants in 24 countries</td>
<td>6.717 € bn.</td>
<td>about 26,000</td>
</tr>
</tbody>
</table>
WE ARE THE CORE OF THE VEHICLE

Structural Components

Crash Management Systems

Chassis & Chassis Modules

Battery Storage

Powertrain Components
PORTFOLIO

CHASSIS & MODULES
Lightweight optimized suspension components made of different materials as well as the development and assembly of highly complex modules

STRUCTURES
Lightweight solutions for vehicle structures in steel and aluminum

ENGINE & EXHAUST SYSTEMS
Powertrain systems and components to reduce emissions

ELECTRO-MOBILITY
Complete and lightweight optimized system solutions for new electric vehicles

MECHANICAL ENGINEERING
Innovative machines, systems and tools for the automotive industry

LIGHTWEIGHT PROTECTION
Development and production of protective solutions for various customers and market segments
EXEMPLARY PROCESSES, PRODUCTS AND SERVICES

- Customer proximity
- Safety relevant and sustainable driving technology
- Components and modules for the automotive industry, in the areas of chassis, body, engine and exhaust systems, as well as solutions for electric vehicles
- Highest levels of engineering and manufacturing expertise
- Partner of the leading global automotive manufacturers
BENTELER STEEL/TUBE IN NUMBERS

LOCATIONS
7 plants and
8 subsidiaries

SALES
1.063 € bn

EMPLOYEES
about 4,400
1. Zistaplex® tubes
2. Hollow shafts for automotive
3. OMLR-tubes for power plant boilers
4. Tubes for oil and gas industry
5. Axle solutions
6. Hydraulic cylinders and line pipes
7. U-tubes for heat exchanger and plant construction
8. Tubes for truck chassis parts
9. Perforating Gun
TAILOR-MADE SOLUTIONS

- Solutions all along the value chain
- Environmentally friendly surface coatings
- Complex solutions in forming technology
BENTELER GLASS PROCESSING EQUIPMENT IN NUMBERS

PROJECTS
more than 3,500 projects in about 60 countries

SALES
55 € million

EMPLOYEES
about 230*

*annual average; measured as full-time equivalents; excluding contract workers
BENTELER Glass Processing Equipment is a leading provider of flat glass processing machinery.

The portfolio includes:

<table>
<thead>
<tr>
<th>Automotive</th>
<th>Architecture</th>
<th>Technical Glas</th>
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<tbody>
<tr>
<td>▪ Solar Module Assembly</td>
<td>▪ Process Application Lines</td>
<td></td>
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<tr>
<td>▪ Automotive CBG-Lines</td>
<td>▪ Washing Machines for flat &amp; curved glass</td>
<td></td>
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<tr>
<td>▪ Cutting</td>
<td>▪ Grinding Machines</td>
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<tr>
<td>▪ Breaking</td>
<td>▪ CNC Processing Center</td>
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<tr>
<td>▪ Seaming Lines</td>
<td>▪ Drilling Machines</td>
<td></td>
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<tr>
<td>▪ Handling Systems</td>
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</tbody>
</table>
EXPERIENCE AND STATE-OF-THE-ART-TECHNOLOGY

- Lengthy experience
- Continuous development of all machines and systems
- State-of-the-art technology
- Energy-optimized
- Proven quality
CONTACT

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