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About Palram

- Palram is a leading multinational manufacturer of extruded thermoplastic sheets and panel systems from polycarbonate, PVC and other materials. The Company also manufactures self assembled finished products ("Do It Your Self").

- The company was established in 1963 in Ramat Yohanann, Israel.

- Palram operates 9 production sites and dozens of sales offices and distribution warehouses worldwide.
Core Values

- Dynamic company
- A leading player in its field
- Stability for over 5 decades
- Innovation
- Creative solution provider

PALRAM
Continuous Growth for Over 55 Years

Technological leadership with tailor made products.

The widest product range in the sector

Worldwide logistic deployment
Innovation & Development

- Palram invests heavily in development and improvement of production and material technologies.
- These efforts yield high flexibility in designating semi-finished products for unique applications and allowing quick response and custom made solutions to customers’ specific and unique needs.
Sales ($US M, K ton*)

- Over 4% growth per annum.

* Including Palram’s sheets sold integrated into Applications division products.
Human Resource - Updated 12.2017

Employees by Operational Region

- Israel: 435
- Palram Applications: 208
- Rest of the World: 94
- Americas: 300
- Europe: 286
- DIY: 47

Employees by Department

- Production: 58%
- Logistics & Sales: 12%
- Marketing: 13%
- Technology and R&D: 3%
- Administration: 14%
Business & Legal Structure as of July 31, 2017
## Palram Milestones

<table>
<thead>
<tr>
<th>Year</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td>Acquisition of 51% of Linerolight Ltd., POS &amp; POP solutions</td>
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<tr>
<td>2016</td>
<td>Expansion of PVC Production in USA. Polycarbonate production expansion in Israel</td>
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<tr>
<td>2015</td>
<td>“Palram DIY Europe” establishment and distribution to European DIY retailers</td>
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<tr>
<td>2013</td>
<td>Increase in PVC capacity in Israel</td>
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<td>2013</td>
<td>Additional polycarbonate production site in Ramat Yohanan, Israel.</td>
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<td>2012</td>
<td>“Palram India” was establishment as a Palram marketing and distribution company</td>
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<tr>
<td>2010</td>
<td>“Palram Russia” establishment as a marketing and distribution company</td>
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<tr>
<td>2009</td>
<td>Establishment of PVC Deck board production line, substitute for wooden deck in the US in addition to “Trimboard” products</td>
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<tr>
<td>2008</td>
<td>“Palram South Africa” establishment as a marketing and distribution company</td>
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<td>2008</td>
<td>Polycarbonate manufacturing plant establishment in Germany</td>
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<td>2007</td>
<td>“Palram Panels Inc.” establishment, for manufacturing PVC products in the US</td>
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<td>2006</td>
<td>“Bayer AG” increases by 5% its holdings in Palram’s polycarbonate manufacturing to a total of 25%</td>
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<td>2005</td>
<td>“Palram Beijing” (JV) for marketing and distribution in China was established with Chinese partner</td>
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<td>2004</td>
<td>“Palram Applications” establishment, manufacturing finished and DIY products</td>
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<td>2004</td>
<td>Capital raising – Second investment round for Institutional investors in Israel</td>
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<td>2003</td>
<td>“Palram Australia” establishment as a marketing and distribution company</td>
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<td>2000</td>
<td>“Palram 2000” – First Palram polycarbonate USA plant founded</td>
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<td>1998</td>
<td>“Bayer AG” becomes a strategic partner, with 20% of Palram’s polycarbonate production activities</td>
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<td>1997</td>
<td>Exclusive supply contract with “Home Depot”, US based and International DIY retail outlet chain</td>
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<td>1996</td>
<td>Polycarbonate “Polycarb” plant founded in the UK</td>
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<td>1994</td>
<td>Initial Public Offering (IPO) &amp; transformation from private to public co.</td>
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<td>1993</td>
<td>“Palram Americas” founded (previously named “SUNTUF Inc” as the Americas marketing and distribution company</td>
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<td>1992</td>
<td>First International PVC manufacturing plant – “DPL” in the UK</td>
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<td>1985</td>
<td>Polycarbonate production initiated at Palram’s Ramat Yohanan plant</td>
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<tr>
<td>1963</td>
<td>PVC production initiated at Palram</td>
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Business Strategy

A Multinational Company and a Leader in its Field
- The third largest polycarbonate sheet extruder in terms of production capacity
- Among the top 10 PVC sheet extruders
- A leading innovator in the field of home gardening and products for self assembly

Business Model
Expand marketing presence through the following:
- Establishment of subsidiaries and marketing offices in target markets
- Maintaining proximity to the marketplace and a high level of service

Production
- Develop a wide variety of unique products and constantly strive for operational excellence
- Constantly expand production sites and develop new production technologies

Research and Development
- High commitment to R&D through significant annual resource allocation for this field
- Develop new products and technologies in state-of-the-art facilities
- Develop environmentally aware products that promote sustainability
Product Divisions

PVC Products
- Excellent chemical resistance
- Excellent fire resistance
- Inherently resistant to microbes
- Ideal for applications in harsh chemical environments

Polycarbonate Products
- Extremely high impact resistance
- Complete UV blocking
- Withstands extreme weather
- High light transmission
- High optical quality

Consumer Products for D.I.Y
- Synergetic products for self assembly that incorporate Palram sheets:
  - Hobby greenhouses
  - Residential canopies, carports and more
  - Residential sheds
Market Segments

AGRICULTURE

CONSTRUCTION

ARCHITECTURE

DIY

SIGN & DISPLAY

FABRICATION
Product Applications: Architecture

Aviva Stadium, Ireland - Corrugated Polycarbonate Sheet

Eastlink Road System, Australia - Flat Acrylic Sheet

FunCity Mall, India - Multiwall Polycarbonate Sheet

Victoria Australia - Curtain Wall at Whitten Oval Stadium
Product Applications: Construction

- Warehouse Sidelights, USA - Corrugated Polycarbonate
- Coca Cola Warehouse, SA - Corrugated PVC & Polycarbonate Sheets
- Hinckley Sports Club, UK - PVC Wall Cladding
- Gaby Mine, Chile - Corrugated PVC Sheet
Product Applications: Agriculture

- Dairy Hall, Canada - Corrugated PVC Sheet
- Commercial Greenhouse Cover, USA - Corrugated Polycarbonate
- Livestock Farm, Uruguay - Corrugated PVC Sheet
- Cattle Shed, Israel - Corrugated PVC Sheet
- Cattle Shed Skylight/Roof - New York, USA
Product Applications: Sign & Display

Illuminated Street Sign, Colombia - Flat Polycarbonate

3D Sign, Israel - Flat Polycarbonate

Display system - Foamed PVC Sheet

Decorative Display, Israel - Foamed PVC Sheet

Direct Digital Printing on PALIGHT® Foamed PVC Sheet - Germany
Product Applications: Fabrication

- Printed PALIGHT® Sheet in CNC Machine - UK
- Diffused Light Boxes in Cosmetics POP - Israel
- P.O.P Stand, Israel - Flat PVC Sheet
- P.O.P Stand, Israel - Multilayered PVC Sheet
- P.O.S, Russia - Flat Acrylic Sheet
- Product Display, Israel - Flat Acrylic Sheet
Product Applications: DIY & Residential

- Residential Conservatory Roof - UK
- Residential Pergola Roofing - Adelaide, Australia
- Residential Pergola, Australia - Polycarbonate System
- Residential Skylight, USA - Corrugated Polycarbonate
- Private Pool House, USA - Corrugated Polycarbonate
- Residential Skylight, USA - Corrugated Polycarbonate
Product Applications: Decking & Trimboard

- 'Trask Banquet Hall' Deck and Walls, Israel - PVC Decking Board
- 'Trask Banquet Hall' Deck and Walls, Israel - PVC Decking Board
- Residential Porch Trim, USA - Foamed PVC Trimboard
- Residential Porch, USA - Outdoor Flooring
- Rooftop Lounge, Israel - PVC Decking Board

PALRAM
Palram Applications: Consumer Products for Self Assembly

- Palram Applications, established in 2004, incorporates Palram sheets into finished products.
- Product lines include hobby greenhouses, canopies, carports, Residential sheds and specialty thermoformed items.
- In recent years Palram Applications has become a leading market player.
- Products are marketed directly to world leading DIY chains: B&Q, OBI, Home Depot and other leading Internet chains.
- Business activity is characterized with a high profitability rate in comparison with the Palram sheet business. The subsidiary's high potential is a major growth engine for the mother company.
Product Applications: **Consumer Products**

- Vitoria 5000 Residential Carport
- Palermo 3600 Gazebo Cover
- 6’x5’ Skylight Shed
- Victory Hobby Greenhouse
- Calisto Twin-Line Door Canopy