

# Kingspan | at a glance

## Business Operation

## Competitive Strengths

### COMPOSITE PANELS



Kingspan has almost single-handedly been responsible for the development of the market for insulated cladding panels in the British and Irish markets. Kingspan is the most highly recognised brand for insulated cladding panels in the markets which it services.

- Strong market leader
- Highly specified brand
- Solution provider

### RAISED ACCESS FLOORS



Kingspan entered the raised floor market through the acquisition of Hewetson in January 1999. Hewetson is the leading innovator and supplier of raised access floors mainly used in high rise office developments in the UK and in selected markets worldwide. The market leadership position for floors was enhanced by the acquisition of the second largest supplier into this market, Durabella, in October 1999.

- Strong market leader
- Superior technical capability
- Capacity and resources to manage major projects

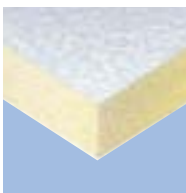
### ENVIRONMENTAL CONTAINERS



Environmental Containers incorporate a range of rotationally moulded products that are supplied to the construction industry. The main products are oil storage tanks, water storage tanks, septic tanks and mini waste treatment plants. A series of acquisitions were made in the last three years giving Kingspan influential market shares for the key products in its range.

- Strong market leader
- Shared technology and manufacturing expertise across all plants
- Most efficient distribution network

### INSULATION



Kingspan manufactures a range of rigid insulation products for use in the construction and related industries. Its products divide into two categories, namely, insulation boards for the building industry and insulation products aimed at HVAC and process industries. The board products are supplied mainly to the British and Irish markets.

- Market leader
- Efficient distribution channels
- Comprehensive product range

### BUILDING COMPONENTS



Building components are supplied to the same kind of projects as those using insulated cladding products though the route to market for some of them is different.

- High market share
- Very efficient product range
- Superior customer service

## Markets served

These products are used as roof and wall cladding solutions in a wide range of projects, but mainly on industrial, distribution, retail and leisure developments. There are four manufacturing locations servicing markets in Britain, Ireland, Western Europe and Central Europe.



High rise office developments are the main market for raised access floors. The manufacturing capacity at the Hewetson plant at Hull is being doubled and all manufacturing will be concentrated at that location, having closed the Durabella facility. This will maximise manufacturing efficiencies.



There are 9 manufacturing facilities in Britain and Ireland supplying the full range of its products mainly to the domestic housing market. These products are distributed through the major builders merchants and specialist plumbing merchants.



Insulation Boards are supplied to industrial and commercial building projects and domestic housing. The products servicing the HVAC and process industries are supplied on a worldwide basis to projects such as airports and hotels in areas of high humidity and on Liquid Natural Gas (LNG) projects. There are four manufacturing plants in Britain and Ireland serving these markets.



Lightweight structural sections are used substantially in steel frame buildings. These are supplied principally to the manufacturers of structural steel buildings mainly in Britain and Ireland and to a lesser extent in Western European markets. These products are supplied from four plants in Britain, Ireland and Central Europe.

# *Building to the power of Kingspan*

Kingspan Group is a successful, fast growing building products company. Its success can be attributed to a tight focus on a range of products that command an increasing market share in the changing construction environment in which it operates. It has achieved real leadership positions in all the geographical areas which it serves.

Through a strong emphasis on product development and marketing, Kingspan is set to continue its expansion internationally in both developed and emerging markets.

**Building  
Components**



**Structural  
Products**



**Insulation**



**Industrial  
Insulation**



**Raised Access  
Floors**



**Environmental  
Containers**