

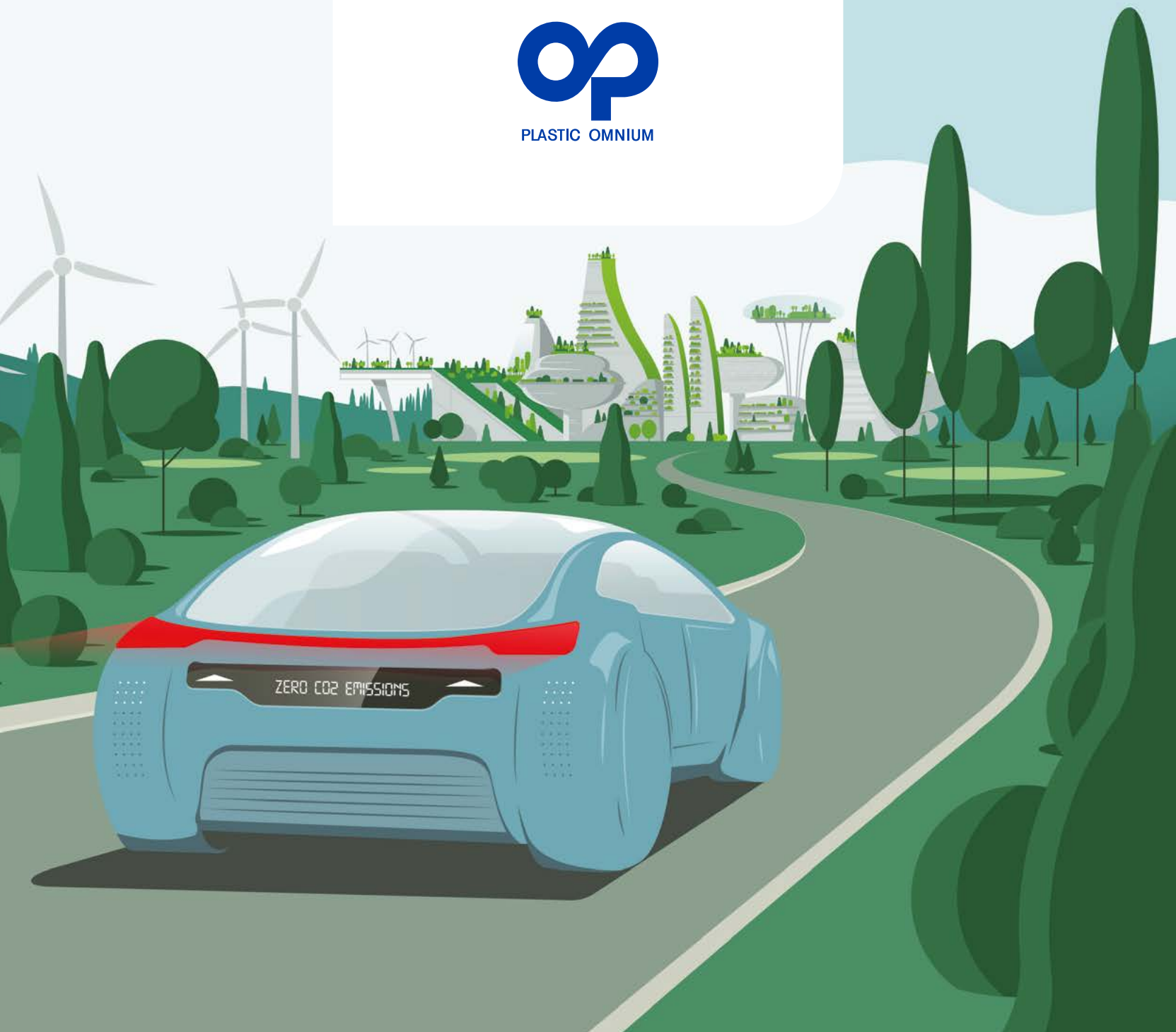
INTEGRATED REPORT 2020

# SHAPING THE FUTURE OF MOBILITY

REVOLUTION POWERED BY PLASTIC OMNIUM



PLASTIC OMNIUM





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## TRANSFORMING TO INVENT THE SUSTAINABLE MOBILITY OF THE FUTURE

Mobility is undergoing a profound change. It is transforming under the combined effect of climate concerns, the energy transition and disruptive technologies. Now more than ever, the automobile is the pivot and driver of future mobility.

At the heart of this sustainable mobility ecosystem, Plastic Omnium is consolidating. World leader across its three businesses, the Group is actively contributing to this clean and connected mobility. In a constantly moving world, where the lines are forever being redrawn, we are transforming from top to bottom, changing our products, our processes and our relationship with the world.

We are accelerating the implementation of our **innovation** strategy to invent the car of the future.

We are sharpening our organization to increase our **agility** and **operational excellence**.

We are deepening our **commitment** and entrenching our solidarity with our stakeholders by ramping up our ACT FOR ALL™ program.

It is this agility, innovation and commitment that enabled us to stand strong and reinvent ourselves in 2020, and will enable us to accelerate our transformation in 2021.

Reinventing mobility.

KEY FIGURES

# Agile and resilient

*The leader in sustainable, connected mobility, Plastic Omnium is inventing the car of the future. In 2020, the Group accelerated its transformation to overcome the crisis and remain ahead of technological disruption in the automobile industry.*

3 businesses,  
3 world leaders



### Design & interactivity

Integrated functions and connectivity

**43% of revenue**

**22 million bumpers**

produced annually.

Or 1 in 6 produced worldwide.



### Sustainable mobility

Energy storage and emission reduction

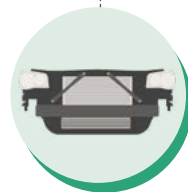
Clean energy solutions

**30% of revenue**

**18 million tanks**

produced annually.

or 1 in 4 fuel tanks produced worldwide.



### Modularity and customization

Development, assembly and logistics of complex and customized modules

**27% of revenue**

**5 million front-end modules**

assembled annually.

Or 1 in 5 assembled worldwide.

## Resilient 2020 results

**€7.7 Bn**

**REVENUE -14%**

like-for-like

**+3 POINTS**

**OUTPERFORMANCE**

Plastic Omnium vs. market

**-17% REDUCTION  
IN PRODUCTION WORLDWIDE**

**€118 m  
OPERATING MARGIN**

**€648 m**

**EBITDA**

**€34 m  
FREE CASH FLOW**

**€807 m  
NET DEBT**



**€2.6 Bn**

**LIQUIDITY**

**41%  
GEARING**

# An ecosystem serving clean mobility

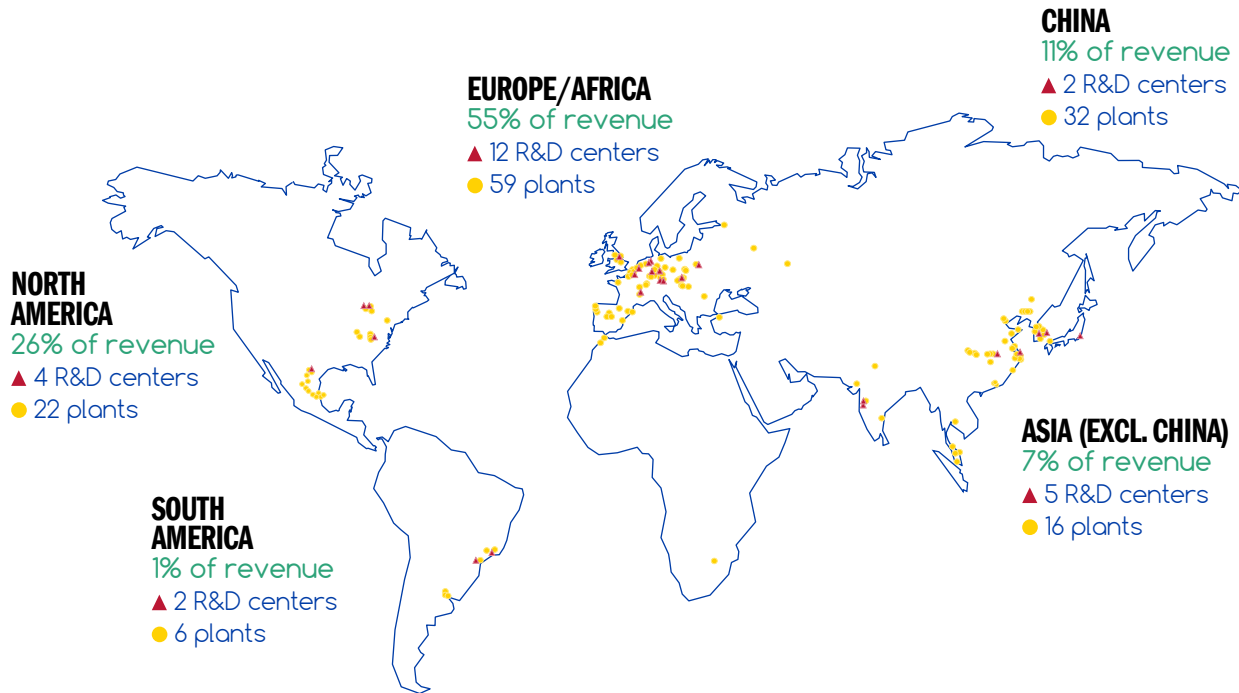
**31,000 employees**

**25 R&D centers**

**135 plants**

**25 countries**

**93 automotive customer brands**



## Responsible, mindful entrepreneurship

- . A unifying global program: **ACT FOR ALL™**
- . €1M Covid fund, **124 initiatives worldwide**
- . Safety: **FR2 = 1.4, down 90% in 10 years**
- . Diversity: **15% women senior executives**
- . 20% of Group purchasing audited by **EcoVadis**

## Target of carbon neutrality by 2050





Laurent BURELLE  
*Chairman of the Board of Directors*

#### MESSAGE FROM THE CHAIRMAN

# Determined and ambitious

*In 2020, Plastic Omnium showed resilience and agility as the automotive market underwent a historic decline. Independent and well positioned in future technologies, the Group is master of its own destiny.*

The world is seeing profound and accelerated change that is clouding our usual landmarks and opening up new horizons. This is truer and more intense than ever in the current circumstances. A key player in this change, the automotive industry is undergoing a transformation and in turn is transforming mobility.

“Plastic Omnium owes its strength and ability to progress and endure through the ages to its teams and independence. It gives the Group the stability and vision needed to analyze and plan for the future.”

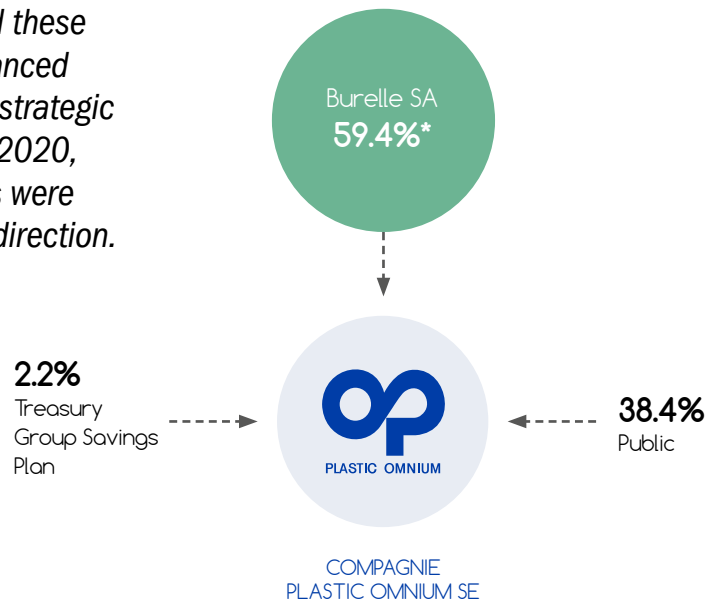
Heir to the entrepreneurial and innovation values of UMDP (Union Mutuelle des Propriétaires Lyonnais) created in 1875, Plastic Omnium has kept apace with the changes to the automobile industry through its innovation and ability to constantly challenge and transform itself for 75 years. This ability has made Plastic Omnium a world leader in automobile components and sustainable, connected mobility. That it was able to span the ages, since 1875 and 1946, is in part due to its independence and, most certainly, its entrepreneurial spirit. It gives the Group the stability and distance needed to analyze and plan for the future. With many companies now questioning and re-evaluating their models, Plastic Omnium is master of its own destiny and remains on track. In a troubled environment where visibility is poor, the Group’s objectives and determination remain intact. Its strength comes from the day-to-day commitment of the employees, the Burelle family – Group founders and majority shareholders – and the new management team who have capably steered the company through the stormy waters of 2020. It falls to this last group to take Plastic Omnium’s ongoing transformation to the next level and turn this crisis into an opportunity to reinvent the Group, yet again, in order to make even greater progress.

# Effective and fully committed governance

As it faces changes in the automotive industry amid these turbulent times, Plastic Omnium can rely on its balanced governance, which guarantees responsiveness and strategic determination in a complex and changing world. In 2020, its members acted to ensure that the fundamentals were respected while maintaining the Group's long-term direction.

## AN INDEPENDENT FAMILY-RUN GROUP SINCE 1946,

Plastic Omnium is 59.4% owned by the Burelle family. This independence provides stability and continuity in the company's strategic management.



\*As of February 25, 2021

## Board of Directors

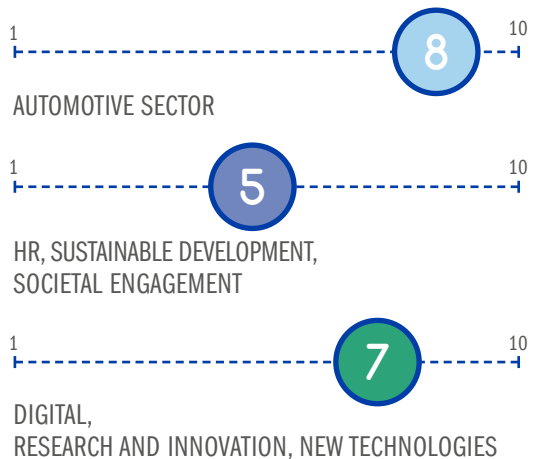


**8 WOMEN**  
OR 47%

**60 YEARS**  
AVERAGE AGE

**6 INDEPENDENT DIRECTORS, OR 40%**

Solid breadth of expertise to meet the Group's challenges, including:



Number of directors by expertise



## A responsible, engaged board of directors

Majority-owned by members of the founder's family, the Group benefits from mixed governance composed of 17 directors and takes a long-term view that has allowed it to grow steadily since its formation. The board's cohesiveness was key in negotiating the health crisis with speed and precision. To fulfil its remit, the board is aided by three special committees: the audit committee, the compensation committee and the appointments committee.



**LAURENT BURELLE**  
CHAIRMAN OF PLASTIC OMNIUM  
CHAIRMAN AND CHIEF EXECUTIVE  
OFFICER OF BURELLE SA



**LAURENT FAVRE**  
DIRECTOR SINCE 2020  
CHIEF EXECUTIVE OFFICER  
OF PLASTIC OMNIUM



**FÉLICIE BURELLE**  
DIRECTOR SINCE 2017  
MANAGING DIRECTOR  
OF PLASTIC OMNIUM



**ÉLIANE LEMARIÉ**  
DIRECTOR SINCE 2009  
REPRESENTATIVE OF BURELLE SA  
MEMBER OF APPOINTMENTS  
COMMITTEE



**JEAN BURELLE**  
DIRECTOR SINCE 1970  
HONORARY CHAIRMAN OF  
PLASTIC OMNIUM



**PAUL HENRY LEMARIÉ**  
DIRECTOR SINCE 1987  
MANAGING DIRECTOR OF  
BURELLE SA



**VINCENT LABRUYÈRE**  
DIRECTOR SINCE 2002  
CHAIRMAN OF THE AUDIT COMMITTEE



**ANNE-MARIE COUDERC\***  
DIRECTOR SINCE 2010  
CHAIRWOMAN OF THE COMPENSATION  
COMMITTEE AND APPOINTMENTS  
COMMITTEE



**JÉRÔME GALLOT**  
DIRECTOR SINCE 2006



**PROF. DR BERND GOTTSCHALK\***  
DIRECTOR SINCE 2009  
MEMBER OF THE COMPENSATION  
COMMITTEE



**ANNE ASENSIO\***  
DIRECTOR SINCE 2011  
MEMBER OF THE COMPENSATION  
COMMITTEE



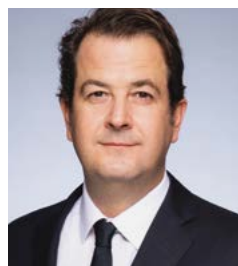
**AMÉLIE OUDÉA-CASTÉRA\***  
DIRECTOR SINCE 2014  
MEMBER OF THE AUDIT COMMITTEE



**LUCIE MAUREL-AUBERT\***  
DIRECTOR SINCE 2015  
MEMBER OF THE AUDIT COMMITTEE  
AND APPOINTMENTS COMMITTEE



**CÉCILE MOUTET**  
DIRECTOR SINCE 2017



**ALEXANDRE MÉRIEUX\***  
DIRECTOR SINCE 2018



**AMANDINE CHAFFOIS**  
DIRECTOR REPRESENTING EMPLOYEES  
SINCE 2019



**IRENEUSZ KAROLAK**  
DIRECTOR REPRESENTING EMPLOYEES  
SINCE 2019

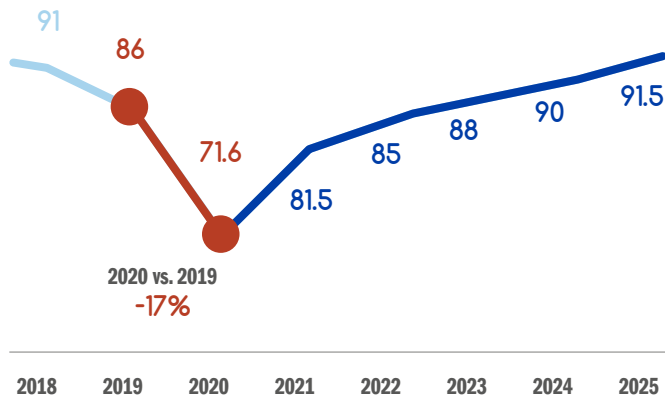
\*Independent Directors

KEY FIGURES

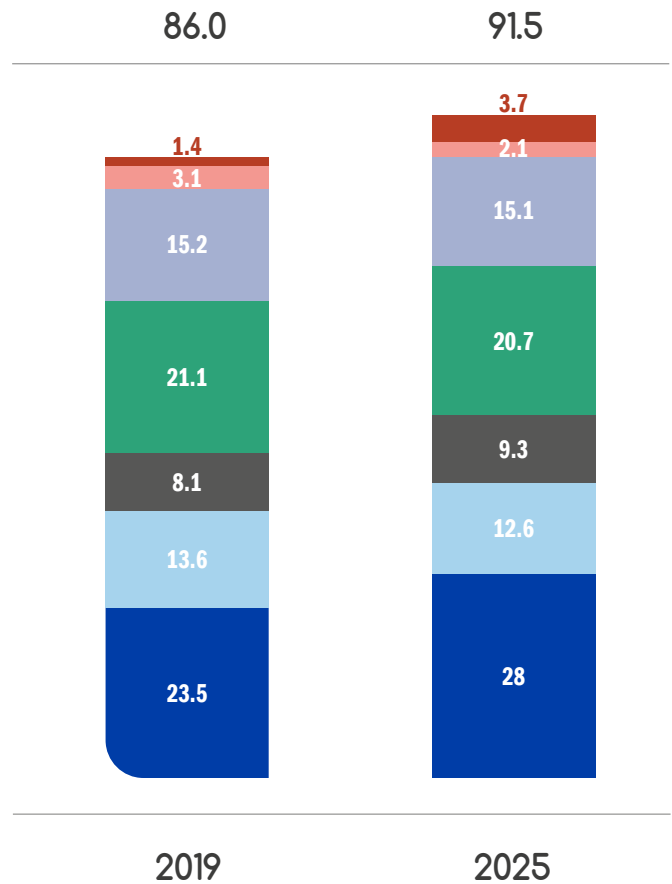
# Step change for the industry

Worldwide automotive production underwent a historic decline during the first half of the year. Recovery, over several years, will be moderate and marked by intense regional disparities. Ongoing technological changes will be amplified, including the more rapid emergence of electric vehicles.

Worldwide automotive production should recover to 2018 volumes from 2025



Intense regional disparities



China – Japan/South Korea – South Asia – Europe  
 – North America – South America  
 – Rest of World

Worldwide production in millions. Source: IHS



# Three strong trends

## 1. GLOBAL REGULATORY PRESSURE



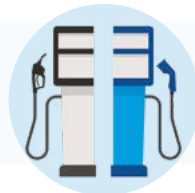
**-25% CO<sub>2</sub>**  
in China

**-20% CO<sub>2</sub>**  
in the USA

**-37% CO<sub>2</sub>**  
in Europe



## 2. A MORE SUSTAINABLE AUTOMOTIVE ENERGY MIX



Evolution of different engine types

	2020	2030
INTERNAL COMBUSTION VEHICLES (ICE)	86.7%	32.3%
MILD & FULL HYBRID VEHICLES	8.5%	27.9%
PLUG-IN HYBRID VEHICLES	1.5%	7.9%
CNG		1.9%
BATTERY ELECTRIC VEHICLES	3.3%	27.9%
HYDROGEN ELECTRIC VEHICLES		2.1%

Plastic Omnium – January 2021

## 3. THE RISE OF CONNECTED AND COMMUNICATING CARS



2019

**35 million**

2024

**352 million**

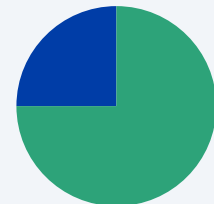
new vehicles on the roads using virtual assistants

Source: IHS – L'Usine Nouvelle 2019

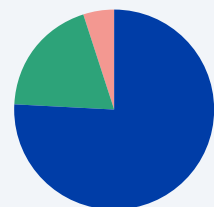
## Hydrogen future

**€7 Bn** state funding allocated to the hydrogen sector in France  
**€9 Bn** in Germany

**2 MILLION VEHICLES** using hydrogen by 2030



**500,000 vehicles** buses / trucks / commercial  
**1.5 million cars**



North America 5%  
Europe 20%  
Asia 75%



Laurent FAVRE,  
Director  
Chief Executive Officer

## PROSPECTS

# At the heart of the mobility industry's transformation

*Perfectly positioned in future technologies and honed by its transformation, Plastic Omnium is ready to pick up the pace. Sustainably.*

### **What is the Group's situation heading into 2021?**

We adapted quickly to this exceptional situation in which automotive production fell by 33% in the first half of 2020, before recovering in the second half. We have continued to outperform worldwide automotive production in every geographical area. Thanks to the effectiveness of the measures we rapidly implemented, we stood firm at first, then rallied strongly and demonstrated, in the second half of the year, our ability to generate a strong level of free cash flow. We approach 2021 with reinforced fundamentals.

### **What did you do to address this unprecedented situation?**

Our priority was to guarantee our employees' safety, maintain our business activity and secure the continuity of our supply chain to serve our customers against a backdrop of extremely volatile demand. To meet these challenges, we had to deal with a range of health and regulatory situations in different countries. The flexibility of our production system and our employees' commitment were decisive factors. I salute the responsiveness and engagement shown by our teams. The "Safe Restart Book" is a prime illustration of this. It was created by our factory teams and shared with all our sites and partners within two weeks. It shows the day-to-day engagement of our teams and their determination to get solutions rolled out in these unusual times.

### **Given the situation, what is the status of your project to transform the Group?**

Transformation is encoded in the Group's DNA. Plastic Omnium's strength lies in its consistent ability to predict market swings and take timely strategic action. Such as the recent focus on hydrogen. By consolidating our position in sustainable, connected mobility, the crisis is bolstering our ambitions and accelerating our transformation for the future. In 2020, we took on several projects to increase our agility and efficiency. The aim of OMEGA, the most pivotal, is to work more effectively and digitalize our operations. Coupled with our operational performance program, it enables us to be more competitive and to lift our investment and innovation.

### **What are the levers for your strategy?**

We believe that the current crisis will speed up the energy transition and affect mobility needs. Given that the automotive market is set to be more than 50% electric by 2025, for example, our strength lies in our mastery of future technologies. Also, our strategy to become number one in the hydrogen mobility market, along with our solutions enabling the electric vehicle to communicate with its environment, put us in pole position. At the heart of the automotive industry's transformation, we are providing ever more content and added-value per vehicle. Plastic Omnium actively contributes to the mobility revolution, which in turn forces us to constantly challenge ourselves while remaining true to our fundamentals. The reason for our successes is our three strategic pillars – operational excellence, innovation and ACT FOR ALL™ commitment – which have been further consolidated by the economic crisis. They are essential in pulling us through this unprecedented situation and crucial to shaping the future. The future of clean and connected mobility.



“We will emerge from this crisis with our fundamentals stronger.”

### **How does your sustainability program tie in with your strategy?**

Our performance is more than financial and technological – it hinges on the way we act and interact with our environment. Our sustainable strategy received a boost from our new ACT FOR ALL™ program. As an integral factor in our performance, it plays a central role in our strategy. Our solutions make us a player in the energy transition. We are reinforcing our commitment with the appointment of a Senior Vice-President for Sustainable Development to the Executive Committee and embedding our target of carbon neutrality for 2050. In all respects, the current crisis has stimulated our alignment with the new economic and societal order and made Plastic Omnium a stand-out in the new automotive landscape. A landscape in which a clean and connected car increasingly involves all our stakeholders.



## STRATEGY

“In a rapidly changing environment, Plastic Omnium is undergoing far-reaching transformation, driven by its OMEGA program, while reinforcing the fundamentals that ensure, and will continue to ensure, its success: operational excellence, innovation and sustainable development. Our three strategic pillars are essential in pulling us through these turbulent times and crucial to shaping the future. The future of clean and connected mobility.”

Laurent FAVRE,  
*Director and Chief Executive Officer*

## Operational excellence

“With demand volatility piling pressure on its supply chain, **Plastic Omnium is paying even greater attention to ensuring it serves every customer just-in-time with zero-defect quality.** This is reflected in the numerous quality awards we have received from customers in every region where we operate. In the future, the OMEGA transformation program will enable the company to work more effectively and accelerate the digitalization of its plants and processes. This is already true of the purchasing functions, with the creation of a platform providing real-time reporting, available to every buyer.”

## OMEGA program

### Digitalization

of plants and processes

### Automation and simulation tools



## Innovation

“Plastic Omnium is developing future technologies to enhance the car’s content. **It is well placed in regard to the 100% electric vehicle, which will represent 17% of revenue by 2025.** Plastic Omnium is convinced that hydrogen is the future of the electric car and is stepping up its research, with support from our  $\alpha$ -Alphatech (France) and  $\omega$ -Omegatech (China) centers, and the new EKPO joint venture with ElringKlinger, the specialist in fuel cell stacks. We are also increasing investments in plastronics, mechatronics and electrochemicals.”

Accelerating  
**electric vehicle programs**

Major developments in  
**hydrogen**

Developing a  
**dedicated modular offer**



## The ACT FOR ALL™ commitment

“Driven by ACT FOR ALL™, the Group’s sustainable development strategy is built around responsible entrepreneurship, care for people and implementing sustainable production. The appointment of an Executive Vice-President for Sustainable Development to the executive committee is a practical expression of this commitment. With some 135 sites in 25 countries, Plastic Omnium takes care to conduct its business as a responsible and respectful local player.

**The creation of a Covid-19 fund demonstrates this determination to be not just an economic player, but a locally engaged company.** The Group can be proud of the numerous local initiatives launched by its teams throughout this crisis. Last, Plastic Omnium has committed to reducing its carbon footprint by targeting carbon neutrality by 2050.”

**Strengthened governance**

**Sustainability indicators**  
incorporated into overall objectives

**Ambition of carbon neutrality by 2050**

# An executive committee driving progress in all areas

*2020 has been an intense year for the management team led since last January by Laurent Favre and Félicie Burelle. They have been kept busy managing and maintaining industrial activity, protecting employees and launching an ambitious transformation plan while positioning Plastic Omnium in future technologies.*







**LAURENT FAVRE**  
CHIEF EXECUTIVE OFFICER



**FÉLICIE BURELLE**  
MANAGING DIRECTOR



**RODOLPHE LAPILLONNE**  
SENIOR EXECUTIVE VICE-PRESIDENT,  
CHIEF FINANCIAL OFFICER AND  
CHIEF INFORMATION OFFICER,  
EXECUTIVE VICE-PRESIDENT PURCHASING  
PERFORMANCE



**STÉPHANE NOËL**  
PRESIDENT AND CEO  
INTELLIGENT EXTERIOR SYSTEMS



**CHRISTIAN KOPP**  
PRESIDENT AND CEO  
CLEAN ENERGY SYSTEMS



**MARTIN SCHÜLER**  
PRESIDENT AND CEO HBPO



**JEAN-SÉBASTIEN BLANC**  
EXECUTIVE VICE-PRESIDENT  
HUMAN RESOURCES



**VALÉRIE BROS**  
CORPORATE SECRETARY  
AND EXECUTIVE VICE-PRESIDENT,  
LEGAL AFFAIRS



**DAVID MENESES**  
EXECUTIVE VICE-PRESIDENT  
SUSTAINABLE DEVELOPMENT



**ADELINE MICKELER**  
EXECUTIVE VICE-PRESIDENT  
CORPORATE FINANCE  
ASSOCIATE MEMBER



**DAMIEN DEGOS**  
EXECUTIVE VICE-PRESIDENT  
PURCHASING PERFORMANCE  
ASSOCIATE MEMBER



Félicie BURELLE,  
Director  
Managing Director

## PROSPECTS

# Renewed momentum

*Félicie Burelle, Managing Director, takes a look at the OMEGA transformation program launched in 2020, which she leads. This is a key program for the Group's future.*

### **Why is the Group accelerating its transformation in the middle of a crisis?**

Changes in the automotive market are being amplified by the crisis we are currently living through. Plastic Omnium is well placed to benefit from the boom in electric cars, and needs a responsive organization to support customers in the move toward sustainable mobility and respond to the new market situation.

While our expertise in future technologies, such as the acceleration of our hydrogen strategy, gives us a real competitive edge, our operational excellence is equally important. The aim of our OMEGA program is to sharpen our organization, making it more agile and more competitive.

### **What levers are you using to achieve this objective?**

OMEGA is an overarching project with the aim of working together more effectively and further digitalizing our operations. Divided into seven project areas, the intention is to permeate the entire company. Indirect Purchasing and Product Development were the first areas to be tackled. For purchasing, which is a major budget item, the objective is to rationalize the supplier portfolio and make better use of our data through a new dedicated structure. For example, we are creating a digital purchasing platform accessible by all our buyers. We are advancing the product development process, including with the creation of a higher-performance PLM (product lifecycle management) tool common to all our businesses. In addition to the €200 million we aim to save by the end of 2022, OMEGA also drives creativity, cooperation and skills development.

# 7 areas for transformation

2 initial project areas

INDIRECT PURCHASING

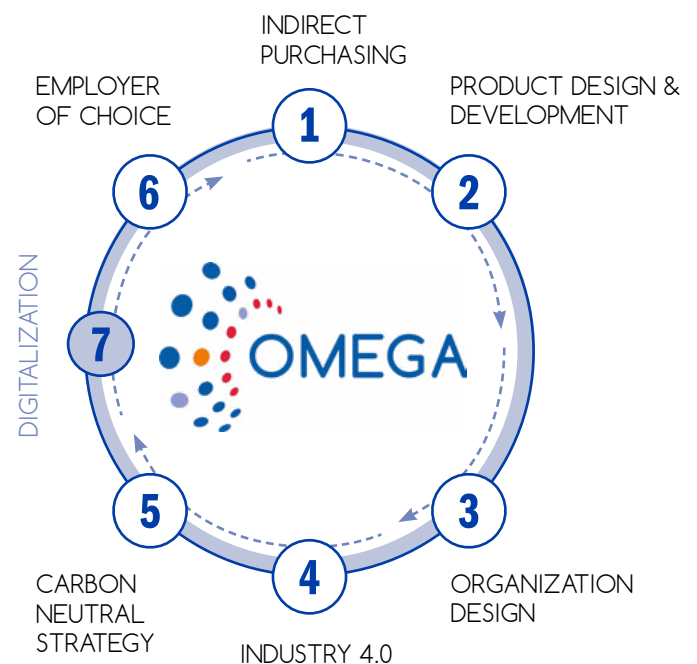


PRODUCT DESIGN & DEVELOPMENT

“The aim of everything we do is to increase the Group’s agility and make sustainable mobility possible for all.”

## What role does the ACT FOR ALL™ strategy play in this transformation?

The aim of everything we do is to make sustainable mobility possible for all, while minimizing our impacts and sharing with our stakeholders the value created. Our performance is all-encompassing and driven by our ACT FOR ALL™ program. For these reasons, our ESG strategy is the backbone of our transformation. A permanent and ongoing transformation shared and driven by our employees.



## BUSINESS MODEL

# The automobile: driving sustainable mobility

A world leader across its three businesses, Plastic Omnium is an automotive actor at the heart of an ecosystem created to make mobility cleaner, safer and more connected.

## RESOURCES

### **AUTOMOTIVE PASSION AT THE CORE OF OUR DNA**

Lasting, independent  
family ownership  
since 1946

A corporate culture  
centered on safety:  
Health & Safety program  
since 2001

31,000 employees  
with shared people-first values

### **OPERATIONAL EXCELLENCE, WORLDWIDE**

135 plants in 25 countries,  
working closely with customers

An ecosystem to meet  
the local needs of a  
fragmented market

OMEGA program:  
efficiency and agility

### **A SOLID FINANCIAL STRUCTURE**

€1.95 billion  
Shareholders' Equity  
€807 million Net debt  
(41% gearing and 1.2 x Ebitda)  
€2.6 billion Liquidity

### **INVESTING FOR INNOVATION**

25 R&D centers

2,500 engineers  
and technicians

4.4% of revenue  
invested in R&D

€200 million invested  
in hydrogen since 2015

€100 million annually planned  
in the coming years

A system of Open  
Innovation and strategic  
partnerships

### **A COMMITTED, ETHICAL COMPANY**

ACT FOR ALL™ program  
3 pillars – 10 markers

86% of employees  
trained in codes of conduct

Energy efficiency program:  
Top Planet since 2008

Diversity: 96 nationalities

# CONNECTIVITY

## SHAPING CONNECTED

# MODU



CLEAN &  
MOBILITY

0 EMISSIONS

LARITY



#### MINIZING OUR ENVIRONMENTAL FOOTPRINT

32% of the electricity purchased by our plants in 2020 was green

68% of sites involved in local community support in 2020

Waste recycling and recovery: 87%

4 plants using renewable energy  
32 in planning stage

#### RESULTS THAT GUARANTEE INDEPENDENCE

€648 million Ebitda

€34 million free cash flow

€0.49 Dividend\*

\* Put to the AGM on April 22, 2021

**CONNECTIVITY:** with function integration, reduced weight and communication with the environment, the sustainable car will be safer and more connected.

**0 EMISSIONS:** creating the zero-emission car through storage and emission reduction systems, and new energy sources such as hydrogen.

**MODULARITY:** making the modular and customized car possible by absorbing our customers' logistic complexity.

## CREATED VALUE

#### MARKET LEADERS IN OUR THREE BUSINESSES

93 global customers

5 new customer Quality Awards in 2020

94% of sites ISO 9001 certified

#### INNOVATING FOR CLEAN AND CONNECTED MOBILITY

5% of revenue from electric vehicles in 2020

17% by 2025

100 hydrogen projects in the pipeline for 93 clients

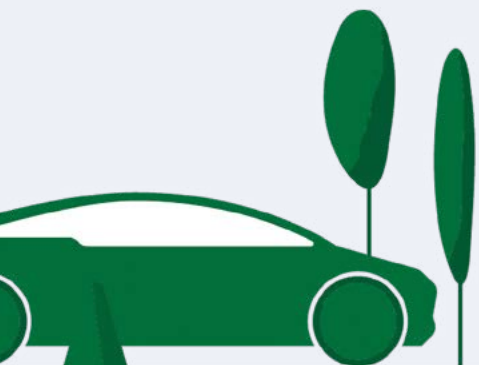
Custom developments of modules for electric vehicles

#### CARE FOR PEOPLE

FR2: 1.4 – down 90% in 10 years

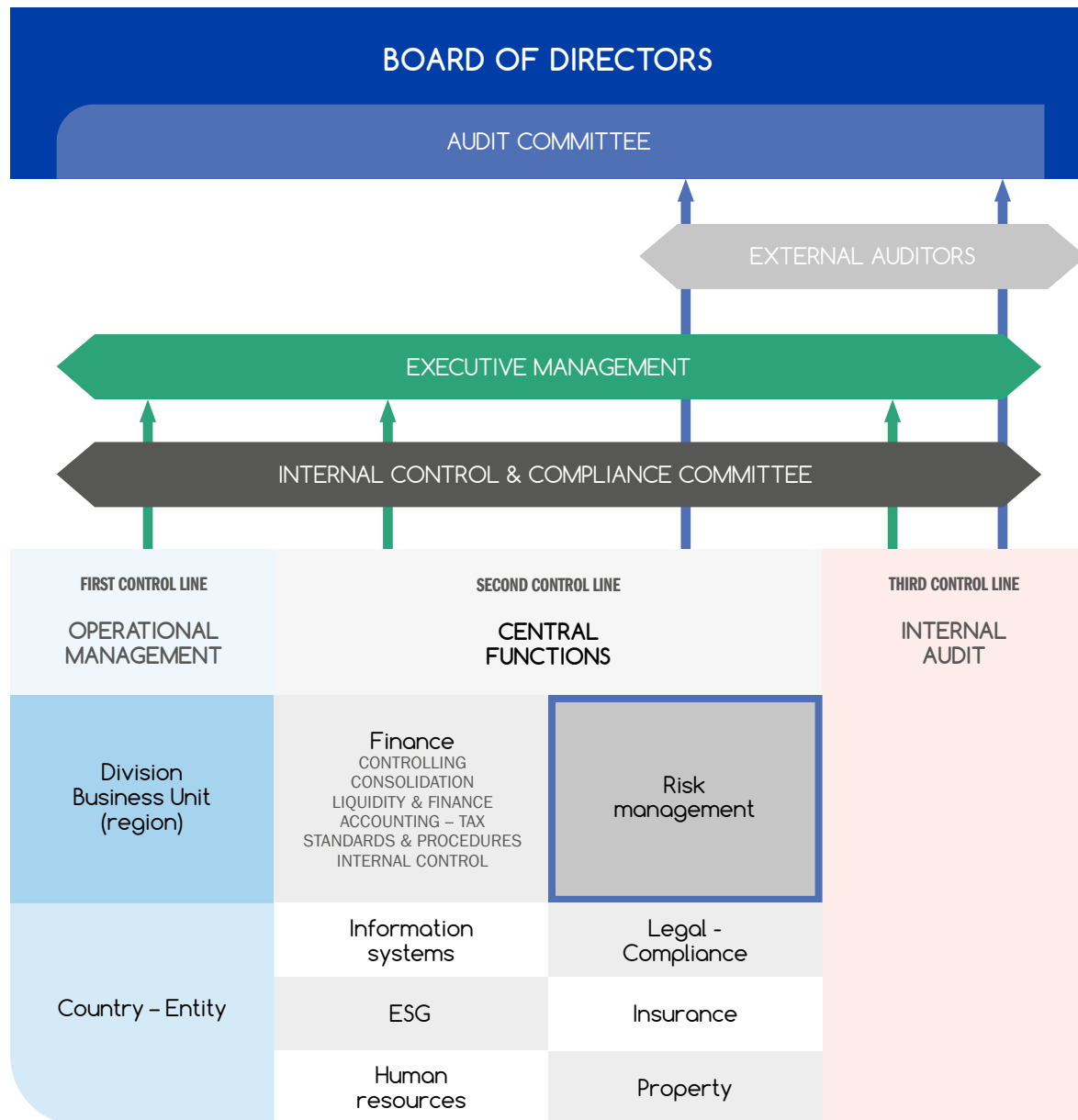
60% of sites run a health campaign

804 interns trained in 2020



# Risk control: a key challenge

As a global Group in a rapidly changing market, Plastic Omnium is exposed to various risks. Governance and processes are in place to manage these through risk control organized in three lines: operational management, central functions and internal auditing.



## Main risks for Compagnie Plastic Omnium SE

### Operational risks

PANDEMIC RISK  
RISK LINKED TO AUTOMOTIVE  
PROGRAMS  
RISK LINKED TO THE QUALITY OF  
PRODUCTS AND SERVICES SOLD  
ENVIRONMENT, HEALTH AND  
SAFETY RISK  
IT RISK

### Strategic risks

RISK LINKED TO EXTERNAL  
GROWTH OPERATIONS

### Credit and counterparty risks

CUSTOMER RISK  
SUPPLIER RISK

### Market risks

RAW MATERIALS COST RISK

### Legal risks

RISK LINKED TO COMPETITION LAW  
RISK LINKED TO INTELLECTUAL  
PROPERTY

## COVID-19

# Covid-19: accelerating change

*Responsiveness and agility underpinned Plastic Omnium's response to managing the crisis and controlling its inherent risks. In fact, the Group has turned the crisis into an opportunity to reinvent itself by accelerating its transformation.*

## Rapid emergency response

Plastic Omnium reacted quickly to protect its employees' health and uphold its fundamentals. The cost reduction and liquidity protection program has been beefed up, and Plastic Omnium is simultaneously adapting its manufacturing base for automotive production that will likely not recover to pre-crisis levels until 2024 or 2025. The benefit will be annual savings of €40 million by end 2022. Home working and furlough schemes have been developed. The Group has also implemented support measures: extra compensation, advance leave, flexible working, etc.

## Restarting production in total safety

With a gradual restart tailored to each region and each manufacturer's needs, the Group's 135 plants were all back in operation on June 24 2020. Their three priorities were employee health, logistics chain reliability and product quality. The restart was governed by the "Safe Restart Playbook" program based on lessons learned from the successful mid-April restart in China. Plastic Omnium then responded to developments in the pandemic in real time, implementing a gradual easing protocol that was adapted each week to the health situation in each country.

## Transforming to shape the future

During the crisis, Plastic Omnium has also reconsidered its organization. The OMEGA program is a response to this need to continuously improve its operations, industrial efficiency and agility. The program's aim is to simplify processes, encourage cooperation between businesses and accelerate the digital transformation. Based around seven different project areas, OMEGA started with Indirect Purchasing and Product Development. It will drive forward a comprehensive transformation to reflect the automotive market's new reality and ensure long-term growth.

IN SITU

# Responsive and local

*In April 2020, in response to the urgency of the situation, ACT FOR ALL™ created a €1 million solidarity fund for COVID-19 initiatives. Employees across 22 countries have put in place 124 grassroots and financial assistance programs to help front-line professionals and vulnerable people.*



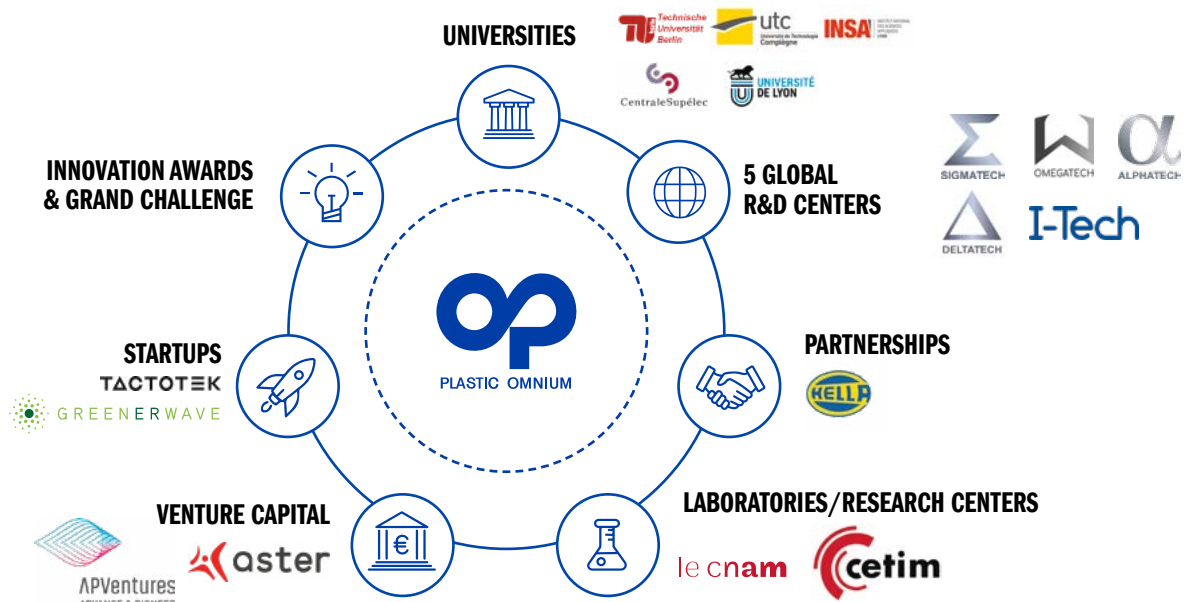
**1.** RAYONG, THAILAND / **2.** MNICHOVO HRADISTE, CZECH REPUBLIC / **3.** GUANGZHOU, CHINA /  
**4.** ANDERSON, USA / **5.** BRITS, SOUTH AFRICA / **6.** PITEȘTI, ROMANIA





# Innovation: boosting content and value

As a technology company, Plastic Omnium is exploring the future of the automobile. The Group is building a manufacturing and research network to closely match auto manufacturers' needs in response to the dual technological and energy transition in the automotive industry.



From emission reduction to aerodynamics, connectivity, function integration, performance of electromagnetically transparent materials, modularity and customization, Plastic Omnium is pursuing research projects in every automotive field to create major technological disruption and increase its per-vehicle content. New fields currently opening up include plastronics, mechatronics and electrochemicals. To tackle the complexity of these subjects, the innovation teams are most often multidisciplinary. This innovation is international in scope, with centers in 25 countries making sense of trends and addressing local needs. And innovation is not only technological: it is also organizational, industrial, digital and cultural.

## Cooperating to invent mobility

Because the car is now evolving in an open, shifting ecosystem, Plastic Omnium cooperates with different partners – startups, universities and influencers – to catch innovation at source and accelerate it.

## Key data

- 25 R&D centers**
- 2,500 engineers**
- 4.4% of revenue** invested in R&D



Christian COSTE,  
Development Manager,  
 $\omega$ -Omegatech site, Wuhan

## Accelerating innovation in hydrogen systems

Plastic Omnium is increasing its investment in hydrogen, which it believes is a key lever for the future of the electric car. As the first OEM in Europe to obtain the European EC79 and international R134 certifications for high-pressure vessels, the Group has partnered with MissionH24 to create a hydrogen electric vehicle category in the 24 Hours of Le Mans endurance car race, in a project that boosts innovation in partnership with manufacturers. But hydrogen also involves the fuel cell stack. Plastic Omnium will invest €100 million in the coming years in its new joint venture, EKPO Fuel Cell Technologies, formed with the automotive supplier ElringKlinger to accelerate this innovation. The aim is leadership of the entire hydrogen chain: high-pressure storage vessels, fuel cell stacks and integrated hydrogen systems.

## Focus on $\omega$ -Omegatech

*Questions for Christian Coste, Development Manager China &  $\omega$ -Omegatech site Manager (Wuhan, China).*

Opened in June 2019 in the heart of Optics Valley, “China’s Silicon Valley”,  $\omega$ -Omegatech is the clean energy systems testing and development center for Asia. Specializing in prototyping fuel systems, emission reduction systems and new energies, this is Plastic Omnium’s pilot R&D center in Asia.

### **What were the developments in 2020?**

“New Energies” activity saw a real uptick this year. We installed a production line for prototype high-pressure hydrogen vessels. To reduce costs, we identified and tested local fibers, resins and components. While waiting for certification from the Chinese authorities for the hydrogen vessel for passenger cars customer requests were focused on truck and bus applications. Chinese auto manufacturers enquired about passenger cars prototypes in order to evaluate our technology on their concept cars.

### **How is $\omega$ -Omegatech assimilating the transformation program?**

To improve efficiency, we integrated some activities in Asia, such as validation of Japanese projects and SCR (Selective Catalytic Reduction) emission reduction systems formerly carried out in South Korea. We are also beefing up our teams with the formation of an Asia-wide pool of experts dedicated to product-process simulation. Last of all, our Chinese mechatronics team is integrating experts from  $\alpha$ -Alphatech (France) to make it even stronger. The aim of all these actions is to make  $\omega$ -Omegatech the go-to center of expertise in Asia.

## Key data

**€30 million investment**

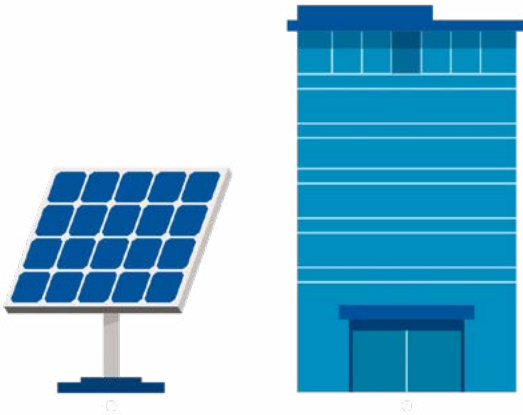
**155 employees**

**50 projects** for 15 Chinese auto manufacturers

**29,000 square meters**

# Responsibility and support

*Sustainable development is a pillar of the Group's strategy, driving its future performance and acceptability. Plastic Omnium's strategy also involves its partners in a process of continuous improvement.*



## Acting locally every day

With 31,000 employees and 135 plants in 25 countries, Plastic Omnium is above all a local player. Around the globe, its managers are ambassadors for the ACT FOR ALL™ program, never compromising on employee health and safety or ethical standards. As a multi-local Group, employees are encouraged and supported in their commitment to acting as locally as possible. For example, the anti-Covid endowment fund has empowered teams to launch solidarity and emergency initiatives.

## At the heart of our business

Plastic Omnium's business activity naturally lends itself to sustainable development. Its technical innovations are reducing emissions from thermal engines and accelerating the emergence of the zero-emission car, with the Group investing massively in hydrogen electric mobility. Two recent developments confirm the strategic importance of this. First is the creation of a new Senior Vice-President Sustainable Development role on the Executive Committee. Second is the aim of achieving carbon neutrality by 2050. The Group is acting to trim its carbon footprint in its factories by reducing energy consumption, buying renewable electricity, developing recycled and biosourced materials, and adopting environmentally responsible practices.

## Acting together

Shared values and a shared ambition. ACT FOR ALL™ ensures that all stakeholders are invested in the ESG program. Take the example of our teams and management in the area of safety. Thanks to their day-to-day commitment and discipline, accident frequency rates, with and without lost time, have fallen by 90% over 10 years. This performance should be repeated in years to come. The partners, too, are fully integrated into the sustainable development strategy. Plastic Omnium's purchasing teams audit and reference suppliers against a series of ESG criteria. This is a key step toward heading in the same direction with those that share the same set of virtuous practices for all.

# ACT FOR ALL™

A unifying global program



**3 KEY STRATEGIC PILLARS**  
**TARGET OF CARBON NEUTRALITY BY 2050**  
**10 MARKERS**

1

## RESPONSIBLE ENTREPRENEURSHIP

	RESPONSIBLE PURCHASING	EMPLOYEES TRAINED IN BUSINESS ETHICS
2020	20%	86%
2025	90%	100%

2

## CARE FOR PEOPLE

	FR2	SITES COVERED BY AN ANNUAL HEALTH CAMPAIGN
2020	1.4	60%
2025	0.5	100%

	ERGONOMICS	DIVERSITY
2020	90% of workstations audited	15% women in managerial posts
2025	100% of workstations audited	25% women managers and senior executives

	NUMBER OF YOUNG TRAINEES	SITES ENGAGED IN LOCAL OUTREACH ACTIVITIES
2020	804 young people trained	68% of sites
2025	1,000 young people trained	100% of sites

3

## SUSTAINABLE PRODUCTION

	TOP PLANET* SITE SCORE	50% MORE SITES
2020	50/100	4 sites using renewable energies
2025	60/100	50% of sites using renewable energies

\*Group energy performance program





INTELLIGENT EXTERIOR SYSTEMS: DESIGN AND INTERACTIVITY

# Innovate to open up new horizons

*Expert in integrating complex functions, Intelligent Exterior Systems is reinventing itself.*

## Invested in future technologies

In step with technological advances in the automotive sector, Plastic Omnium is acquiring expertise at the very cutting-edge of developments. The R&D department is extending its capabilities into the areas of lighting, antennas, radars and the integration of key electronic components. Plastic Omnium's center of gravity is moving from plastics production toward new business areas contributing to the technological enhancement of exterior parts by adding electronic components and functions to surfaces. In 2020, the Group stepped up its innovation activities, targeting technologies that facilitate the development of connected and increasingly autonomous vehicles while incorporating ambitious design parameters that enable customers to adopt an ever more attractive style.

Innovation is going global, with offices opening in the United States and China to get in on the ground floor with trends and develop products in line with local regulations. Plastic Omnium promotes open innovation, forging partnerships with new players in the automotive ecosystem, in order to speed up research time. Bumpers interactive tailgates, function integration and more... Plastic Omnium is developing lightweight, intelligent exterior parts for the next generation of vehicles. With expertise in integrating complex functions, the Group is leveraging its know-how in electromagnetically transparent materials to create Smart Face and Smart Tailgate with onboard radars, lidars and sensors. In 2020, Plastic Omnium and its partner HELLA received second prize in the partnership category of the CLEPA Innovation Awards for our shared SmartFACE project.

Stéphane NOËL,  
President and CEO of  
Intelligent Exterior Systems



“Serving design and interactivity, Plastic Omnium incorporates a growing number of increasingly complex technologies. Our innovation paves the way for a new generation of vehicles with smarter, more aerodynamic and more protective exterior components. Increasingly personalized, they incorporate advanced lighting functions that give each model its unique style. For a different and more sustainable driving experience.”

With zero emissions,  
the electric car of the future  
is also connected

As a leader on its market, Plastic Omnium integrates state-of-the-art technologies into exterior parts to make mobility safer and more autonomous. Plastic Omnium is also active in the integration of lighting solutions that offer great freedom of style, enabling auto manufacturers to innovate through their signature lighting. The Group’s added-value lies in knowing how to integrate several technologies and make them work together in a restricted environment and space. Stimulated by CO<sub>2</sub> emission regulations and today’s societal expectations, new projects for 100% electric vehicles are proliferating. These are opportunities for Plastic Omnium to increase its per-vehicle content and broaden its customer base. In 2020, Plastic Omnium continued to grow with its historical customers and gained new business with electric mobility “pure players”... such as Tesla, Lucid Motors and Polestar.

“Innovate to  
improve efficiency.”

“Plastic Omnium is integrating more and more technology into exterior parts and more functions into vehicle surfaces. Our teams are growing their expertise in lighting, antennas, radars and electronic integration.”

Mehdi Ferhan, VP Engineering,  
Innovation & Partnerships

“Agility is Plastic Omnium’s strength. In 2020, it enabled us to absorb the stop-start order patterns that created tensions in the production chain. To reinforce our operational excellence, we successfully optimized our plants and equipment to assimilate the market’s increasing instability and complexity.”

Pierre-Henri Desportes,  
CEO of Central Europe Business Unit

“The digital transformation and cooperation in the Purchasing function are a source of performance and fluidity in our relationship with suppliers. Our performance is also reflected in the incorporation of ESG criteria into our supplier referencing. The digitalization process we have initiated allows real-time, 360-degree reporting on their performance.”

Philippe Rizzo, VP Purchasing

# Design & interactivity



2nd prize in the CLEPA  
Innovation Awards  
for Plastic Omnium and HELLA



## Smart Face

Combining design, signature lighting et interactivity.  
Smart Face from Plastic Omnium is reinventing the bumper to make it connected.



### Intelligent

Electromagnetic transparency allowing radar and lidar functions



### Communication

Integrated screens, message display and enhanced safety



### Style

Customized lighting and freedom of style to create a distinct identity



### Connectivity

Integration and protection of driver assistance technologies



“Plastic Omnium is integrating more and more technology into exterior parts and more functions into vehicle surfaces. Innovation is going global and focusing on a number of technologies to improve efficiency. Our teams are growing their expertise in lighting, antennas, radars and electronic integration.”



## Smart Tailgate

Radars, sensors and signature lighting: our Smart Tailgates integrate more value-added and onboard intelligence, and communicate with their environment for enhanced safety.



### Intelligent

Onboard antenna systems and opening obstacle detection sensors



### Communication

Dynamic message display function for enhanced safety



### Light weight

Up to 30% lighter than a metal tailgate

# Action for the energy transition

*In pursuit of clean mobility, Plastic Omnium focuses on energy storage, designing emission reduction systems for all engine types and helping to create the zero-emission car.*



Plastic Omnium is the world leader and benchmark in energy storage systems, fitting a fuel tank to one vehicle in four produced worldwide. Against a backdrop of stricter environmental standards and energy transition, the Group helps automotive manufacturers meet their environmental impact reduction targets by developing innovative solutions for all engine types: gasoline, diesel, hybrid and plug-in hybrid. It is developing fuel systems equipped with intelligent fluid and vapor management, and high-technology fuel tanks to meet the specific needs of plug-in hybrid engines. Today, Plastic Omnium is accelerating the transition to zero-emission vehicles and hydrogen electric mobility.

## An intense year for hydrogen

In 2020, Plastic Omnium accelerated its strategy of expansion into hydrogen with some major milestones reached:

INTERNATIONAL CERTIFICATION FOR ITS 350- AND 700-BAR VESSELS

HYDROGEN VESSELS DEVELOPED FOR BUSES

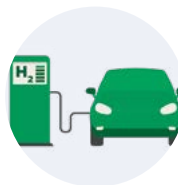
HYDROGEN STORAGE SYSTEMS PRODUCED FOR DUTCH TRUCK MANUFACTURER VDL

FRENCH-GERMAN JOINT VENTURE EKPO FUEL CELL TECHNOLOGIES FORMED WITH ELRINGKLINGER, SPECIALIST IN FUEL CELL STACK PRODUCTION

PARTNERSHIP WITH “MISSION H24” TO DEVELOP THE FIRST 100% HYDROGEN RACE CARS FOR THE 24 HOURS OF LE MANS ENDURANCE RACE IN 2024

---

## The 3 advantages of hydrogen mobility



**5 MINUTE-  
REFUELING TIME**



**700 KILOMETER  
RANGE\***

\*440 MILES



**0 GRAMS OF CO<sub>2</sub>**



Right: Christian KOPP,  
President and CEO  
of Clean Energy Systems  
Left: Marc PERRAUDIN,  
CEO of New Energies

## Accelerating the hydrogen strategy

*Plastic Omnium aims to become  
the leader in the complete system.  
Christian Kopp and Marc Perraudin  
explain.*

### Key data

**€200 m**

invested since 2015

**€100 m INVESTMENT**

annually in the coming years

**280 ENGINEERS**

dedicated to rolling out  
hydrogen systems

**2 R&D AND HYDROGEN HUBS**

France (Compiègne)  
and China (Wuhan)

### Why is Plastic Omnium investing in hydrogen?

**Christian Kopp:** It's a technology we've been backing since 2015, long before hydrogen took center stage. Hydrogen-powered mobility works in perfect harmony with the electric car. It has three main advantages: it's suitable for long distances, produces zero-emissions and powers an electric car by generating electricity on board.

### How exactly does a hydrogen-powered car work?

**Marc Perraudin:** It is based on three central parts: a high-pressure hydrogen storage system, a fuel stack that acts as a power plant to supply electric power to the engine, and finally, the "system" of components needed to make the cell stack work – thermal management, electronics, fluid management and power converters. Our strength is being the only player established across the whole hydrogen mobility value chain.

### How did you reach this level of development?

**Christian Kopp:** Energy storage has been our business for decades. We've invested more than €200 million in hydrogen technologies over five years, such as with Optimum CPV, the world leader in filament winding. In late 2020, we formed a joint venture with ElringKlinger (EKPO) to accelerate our progress into the field of fuel cell stacks. These investments enable us to offer our customers the whole value chain – from onboard hydrogen storage to the integrated system – in a "one-stop shop" strategy.

### What technical challenges remain?

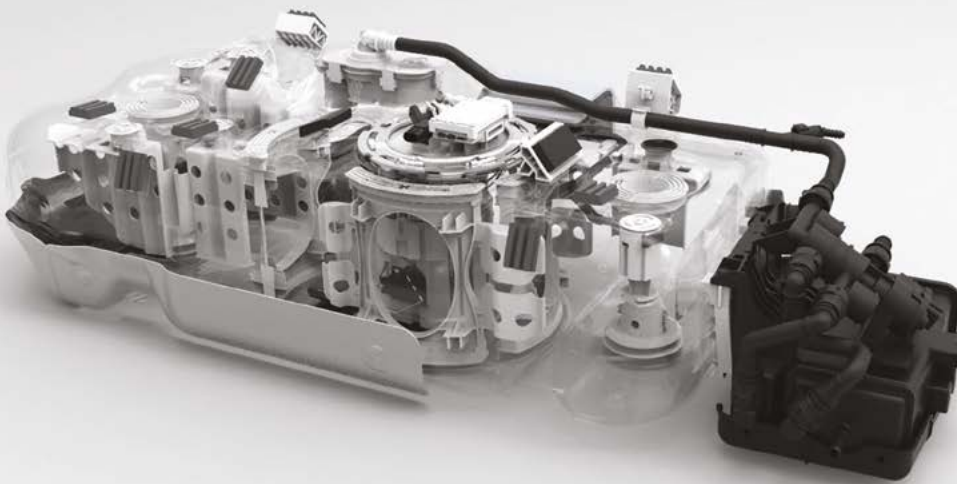
**Marc Perraudin:** The market is still in the pilot project phase for fleet vehicles. There are three issues to be addressed: mass production to bring down the cost of the technology, the development of infrastructure and reducing volume to make this technology compatible with all vehicles. With regard to the third point, we have a highly advanced, perfectly fit-for-purpose research and industrial facilities.

### What is the next step?

**Christian Kopp:** The momentum is there. We've obtained the certification for our 350- and 700-bar hydrogen vessels ready to outfit the first vehicles in 2021. Commercially, we've taken our first order for 350-bar hydrogen vessels from a German bus manufacturer. Over the next few years, we will be investing €100 million annually to develop the product offer and our industrial presence.

# A key energy transition player

*At the heart of the automotive industry's transformation, against a backdrop of stricter environmental standards, Plastic Omnium helps automotive manufacturers to develop innovative solutions for all engine types: gasoline, diesel, hybrid and plug-in hybrid, and hydrogen electric.*



212  
patents filed



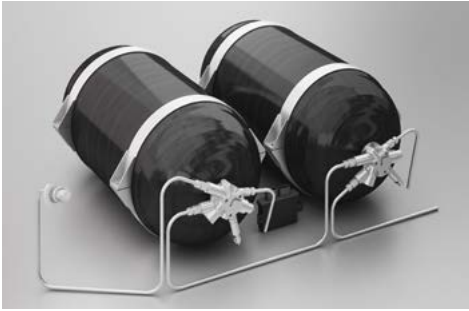
Mechatronic  
(E-valve)  
system & computer  
for optimized  
filling and internal  
vapor flow  
management



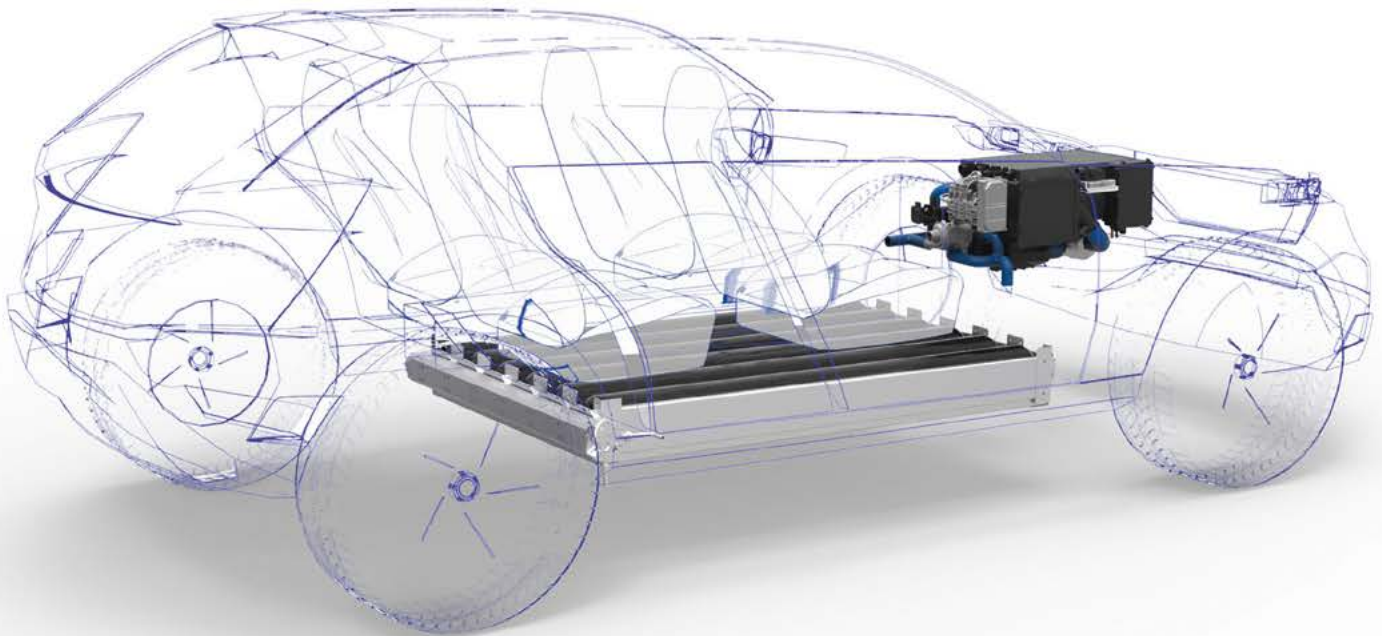
30% lighter than  
the metal equivalent

## Tanktronic<sup>®</sup>, the ultra-high-technology fuel tank designed for plug-in hybrids

Tanktronic<sup>®</sup> meets the specific requirements of rechargeable plug-in hybrid vehicles. It contains an innovative electronically controlled valve – the E-valve. This system makes it possible to reduce the cost of the tank by combining certain components and integrating functions that make it more effective.



Plastic Omnium is confident that hydrogen will play a major role in the clean mobility of the future. Pioneering this technology, the Group has invested €200 million since 2015 to increase its expertise across the entire hydrogen value chain.



2 hydrogen-focused R&D sites in France and China



First contracts for commercial vehicles & customer portfolio growing

## Objective

To meet customers' needs across the entire hydrogen chain with a "one-stop shop" strategy offering high-pressure hydrogen vessels, fuel cell stacks and total system management.



Production capabilities across the entire value chain

# Inventing “next-generation” modules

*Plastic Omnium is already a world leader in developing front-end modules for all engine types at a time when the automotive industry is increasingly trending toward modular architecture.*



Plastic Omnium, through its 66.66 percent-owned joint venture HBPO, is the world leader in front-end module development, assembly and just-in-sequence logistics. Every fifth front-end module assembled worldwide is a HBPO module. Compact, aerodynamic and packing components and technologies into a small space, the front-end module is technically highly complex. This key section of the vehicle typically houses vital components such as the fascia, bumper beam, front active grille shutter, lighting, engine cooling systems, radars and driving assistance sensors. In addition to safety and driving comfort, it contributes directly to the vehicle's aerodynamic performance, tying in with the growing trend towards vehicle customization. HBPO is currently working on other types of modules, such as cockpits and center consoles, that are key to the vehicle's identity, safety, efficiency and in-car experience. Today, the autonomous electric vehicle is opening up opportunities for ever-greater modularity and increasing the number of components to be integrated and assembled in a module. We can also integrate lidars, radars and cameras into our front-end modules on customer request.



Above: Martin SCHÜLER, *President and CEO of HBPO*  
 Below: David CASTELL, *Business Development & Marketing Director of HBPO*

## What next for HBPO?

*Looking to the future, HBPO launched an innovative ideation process. Martin Schüller and David Castell explain.*

### Which words best describe your 2020 experience?

**Martin Schüller:** Responsiveness, flexibility and opportunity come immediately to mind. Operationally, part of the company concentrated on resuming business activities. We needed to make our plants operational quickly, while ensuring that the restart in no way jeopardized our employees' health, and guaranteeing our customers quality just-in-sequence supply. HBPO also seized the opportunity that the dip in activity, driven by the pandemic, offered to identify our future growth drivers. In response, we initiated a creative process to increase our value-added in the electric car of the future.

### How did you go about this?

**David Castell:** We based our discussion on how to create value for new-energy cars. First, we listed all the differences between electric and internal combustion vehicles. Involving our stakeholders in this brainstorming process, we then explored the possible innovations from the user's perspective.

### Which potential innovations stood out?

**David Castell:** We had various ideas in the pipeline that are currently still in development. These studies were carried out worldwide with support from various areas of the business, and within our company as well, of course. By surveying users in our three main regions (Europe, Asia and North America), checking the feasibility of single technical solutions with selected suppliers, and involving our South Korean joint venture, which contacted local YouTube automotive influencers to collect even more end-user feedback, we again proved our ability to think "outside the box". How exactly can the end user benefit? What really creates added value for them? Conference call interviews with our clients throughout the process helped us to shortlist some ideas and identify their specific needs, which our development team took into consideration. But that was just the start of the journey, and we are now working at high speed, arranging innovation rounds with our clients to identify potential projects.

## Key figures

**2,700 EMPLOYEES**

**31 PLANTS**

**11 COUNTRIES**

**18% MARKET SHARE**

**5 MILLION MODULES**

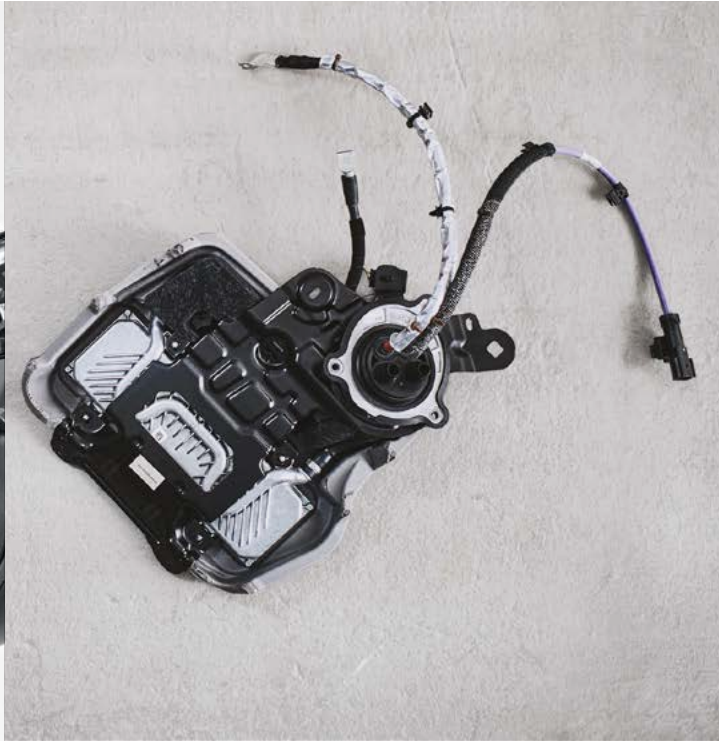
assembled annually

**CUSTOMIZATION:**

**UP TO 15,000 VARIANTS**

per model

# Modules and customization



## Front-end Module

A key design element for a vehicle and its identity, the front-end module contributes to the vehicle's characteristic look, while the equipment it contains adds directly to its safety and reliable operation. From design to development, through assembly and logistics operations, the Group's solutions are tailored for each customer, including over 140 parts and allowing for over 15,000 different combinations for the same car model.



Every fifth front-end module globally is assembled by HBPO



Up to 15,000 variants for one front-end module



Up to 140 parts per front-end module

## DC/DC Converter

The DC-DC Converter is designed for mild hybrid vehicles, which contain various electronic devices operating at voltages ranging from 12 V to 48 V. It converts direct current from one voltage level to another, improving the vehicle's overall efficiency.



Optimizes the vehicle's electrical operation



22 combinations possible  
Up to 70 parts per module



“We have focused our attention on creating value for cars powered by new energies.”



## Active Rollo

The HBPO Active Rollo is a further development of the Active Grille Shutter, using a thin textile instead of moving plastic parts. Designed to improve vehicle aerodynamics and help reduce drag and tractive resistance, the Active Rollo contributes to reduced vehicle consumption and indirectly to reducing CO<sub>2</sub> emissions, as well as allowing longer range in electric vehicles.



Applicable on all types of engines



Solution for vehicles with limited space



Improves vehicle's fuel consumption with a similar increase in efficiency to AGS



Highly demanding interior



Challenging logistics



Up to 150 parts per cockpit module

## Interior Modules: cockpit and center console

For safety and comfort reasons, the interior is one of the most important elements in vehicle design. It has exacting requirements for design elements such as colors or sensitive surfaces and in electronics for the navigation system and infotainment. The cockpit as well as the center console play a major role in the car maker's signature, making the end quality of these products absolutely essential.

# Financial and non-financial performance indicators

## Financial outlook for 2021

In 2021, as a whole, worldwide automotive production is forecasted to grow by 14%\* to 81.5 million vehicles. For its own business planning purposes, Plastic Omnium is applying a 5% discount to that forecast.

\*Source: IHS – February 2021

## Plastic Omnium expects the following in 2021

A STRONG REBOUND IN REVENUE

OPERATING MARGIN OF 6% SIMILAR TO THE LEVEL SEEN IN 2019

FREE CASH FLOW OF MORE THAN €220 MILLION, HIGHER THAN THE 2019 FIGURE

## Stock exchange price in 2020



## Non-financial indicators

### 34 FACTORIES CERTIFIED ISO 50001\*

30% UP ON 2018

\* Voluntary international standard for improving energy efficiency and reducing emissions.

### 32% OF ELECTRICITY PURCHASED BY THE GROUP IS GREEN

That is 14% higher than the green energy average in the countries where we operate.

### 15% SENIOR MANAGEMENT POSITIONS OCCUPIED BY WOMEN

UP 20% ON 2018

## 2020 financial indicators

### ECONOMIC REVENUE

€7.732 Bn

-14% LIKE-FOR-LIKE

### OPERATING MARGIN

€118 m

### FREE CASH FLOW

€34 m

### IMPROVED LIQUIDITY

€2.6 Bn

### PROPOSED DIVIDEND

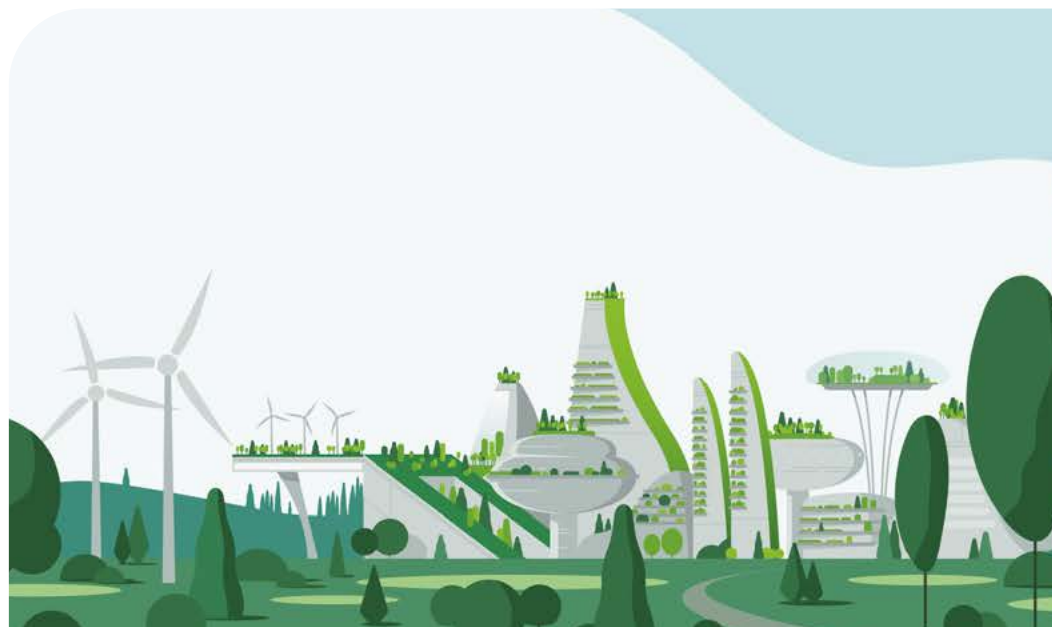
€0.49

STABLE COMPARED WITH 2019

Second half 2020 results  
well above guidance

	GUIDANCE AT 07/23/2020	GUIDANCE AT 11/25/2020	SECOND HALF 2020 RESULTS
OPERATING MARGIN	> 4% OF REVENUE	> 5% OF REVENUE	5.7% OF REVENUE
FREE CASH FLOW	> €250 m	> €400 m	€606 m

IN THE SECOND HALF 2020, EBITDA CAME TO €477 MILLION (11.6% OF REVENUE) AND THE NET INCOME WAS €152 MILLION (3.7% OF REVENUE).



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1, allée Pierre Burelle  
92593 Levallois-Perret Cedex – France  
Tel.: +33 (0)1 40 87 64 00  
Fax: +33 (0)1 47 39 78 98  
[www.plasticomnium.com](http://www.plasticomnium.com)

Compagnie Plastic Omnium SE  
European Company with issued capital of €8,827,329.18  
Headquarters: 19, boulevard Jules-Carteret – 69007 Lyon – France  
955 512 611 RCS Lyon – APE: 6420 Z

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PLASTIC OMNIUM

