

Group Overview

NSG Group is one of the world's leading manufacturers of glass and glazing systems in the business areas: Architectural, Automotive and Technical Glass.

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| Float plants: 27 operated by NSG Group | Automotive plants: 24 in 14 countries | Technical Glass plants: 11 in 5 countries |
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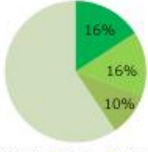

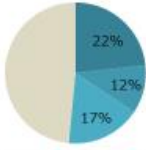

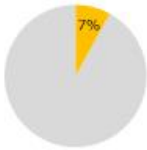

Founded in 1918, NSG acquired the leading UK-based glass manufacturer Pilkington plc in June 2006. Today, the Company has combined sales of around JPY 600 billion, sales in over 100 countries, employing some 27,000 people worldwide.

NSG Group has major market shares in most building and automotive product markets of the world, with a broad geographic reach, enabling it to respond to customers whose Operations, particularly in the case of Automotive OE, are increasingly global.

We produce high-quality glass products that make an important contribution to improving living standards, to people's safety and well-being and to the generation and conservation of energy.

Businesses

Global Three Businesses: Architectural, Automotive, and Technical Glass

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|--|---|--|
| <p style="text-align: center; color: #0070C0;">Architectural: 42%</p>  <p style="text-align: center; font-size: small;">■ Europe ■ Asia ■ Americas</p> <p>Products:</p> <ul style="list-style-type: none"> - Building glass & glazing - Glass for solar panels <p>Business:</p> <ul style="list-style-type: none"> - 27 float lines operated globally - Leading supplier for thin film solar panels  <p style="font-size: x-small; text-align: center;">Granroof at Tokyo Station</p> | <p style="text-align: center; color: #0070C0;">Automotive: 51%</p>  <p style="text-align: center; font-size: small;">■ Europe ■ Asia ■ Americas</p> <p>Products:</p> <ul style="list-style-type: none"> - Glazing for new vehicles - Glazing for replacement markets <p>Business:</p> <ul style="list-style-type: none"> - Key operations in 14 countries - Supplying world's leading vehicle manufacturers - Key player globally in automotive aftermarket (AGR) glazing distribution and wholesale  <p style="font-size: x-small; text-align: center;">Complex-shaped back light Courtesy of TOYOTA Global Newsroom</p> | <p style="text-align: center; color: #FFD700;">Technical Glass: 7%</p>  <p style="text-align: center; font-size: small;">■ Americas</p> <p>Products:</p> <ul style="list-style-type: none"> - Thin glass for display etc. - Lenses for printers and light guide - Special glass fiber such as battery separators, glass code for car engine timing belt, etc. <p>Business:</p> <ul style="list-style-type: none"> - Key operations in Asia and Europe - Unique 'Number One' and 'Only One' niche products  <p style="font-size: x-small; text-align: center;">Super Glass Paper™</p> |
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100 Years of History

1920s - 1940s

Capacity expansions.

Nov1918

America Japan Sheet Glass Co., Ltd. was established in Osaka Japan

1920

New capacity added at Kitakyushu

1931

Company name changed to Nippon Sheet Glass Co Ltd

1935

New plant at Yokkaichi



Futajima Plant in Fukuoka, Japan

1950s-1960s

Production capacity and capability increases.

Full scale entry to the Automotive glass business.



First piece of float glass ever made in Asia



Maizuru Plant in Kyoto, Japan

1950

Company shares listed in Tokyo and other stock exchanges in Japan

1951

New plant at Maizuru

1963

New plant at Chiba

1965

Float glass production commenced in Asia with technology licensed from Pilkington

1970s-1990s

Automotive glass business growth and Globalization of Architectural and Automotive Glass businesses.

Focus on new products and technologies.

Overseas investments as foundation of the Technical Glass business.



The SELFOC is still core technology in NSG

1968

SELFOCTM™ was developed

1970

Manufacturing footprints expanded in Kanagawa and Kyoto

1971

The first overseas investment in Malaysia

1975

Automotive joint venture established in Mexico

1978

Thin glass UFF™ production start

1979

Launch of the glass fiber business

1979

NSG Foundation established to commemorate the 60th anniversary of the Company

1986

Automotive joint venture established in the US

1990s-Today

Further business expansion in Asia.

Closer business relationship with Pilkington.



1990

A 20 per cent stake of LOF acquired

1995

An Automotive joint venture established in China and an Architectural joint venture in Vietnam

2000

A share of Pilkington acquired

2001

Increase in Pilkington shareholding to 20 per cent. Pilkington became an affiliate of the Company

2004

Company headquarters moved to Tokyo

2006

Acquisition of Pilkington plc

2007

Second Architectural joint venture established in Vietnam

2008

2008 Company's Corporate Governance Structure changed to three committees

2014

Long term strategic vision and medium-term plan (MTP) launched

2017

MTP redefined and MTP Phase 2 began covering FY2018 – FY2020

Nov 2018

100th Anniversary

