



Ansell Corporate Presentation

2019

Ansell

HyFlex® GAMMEX® AlphaTec® MICROfLEX®

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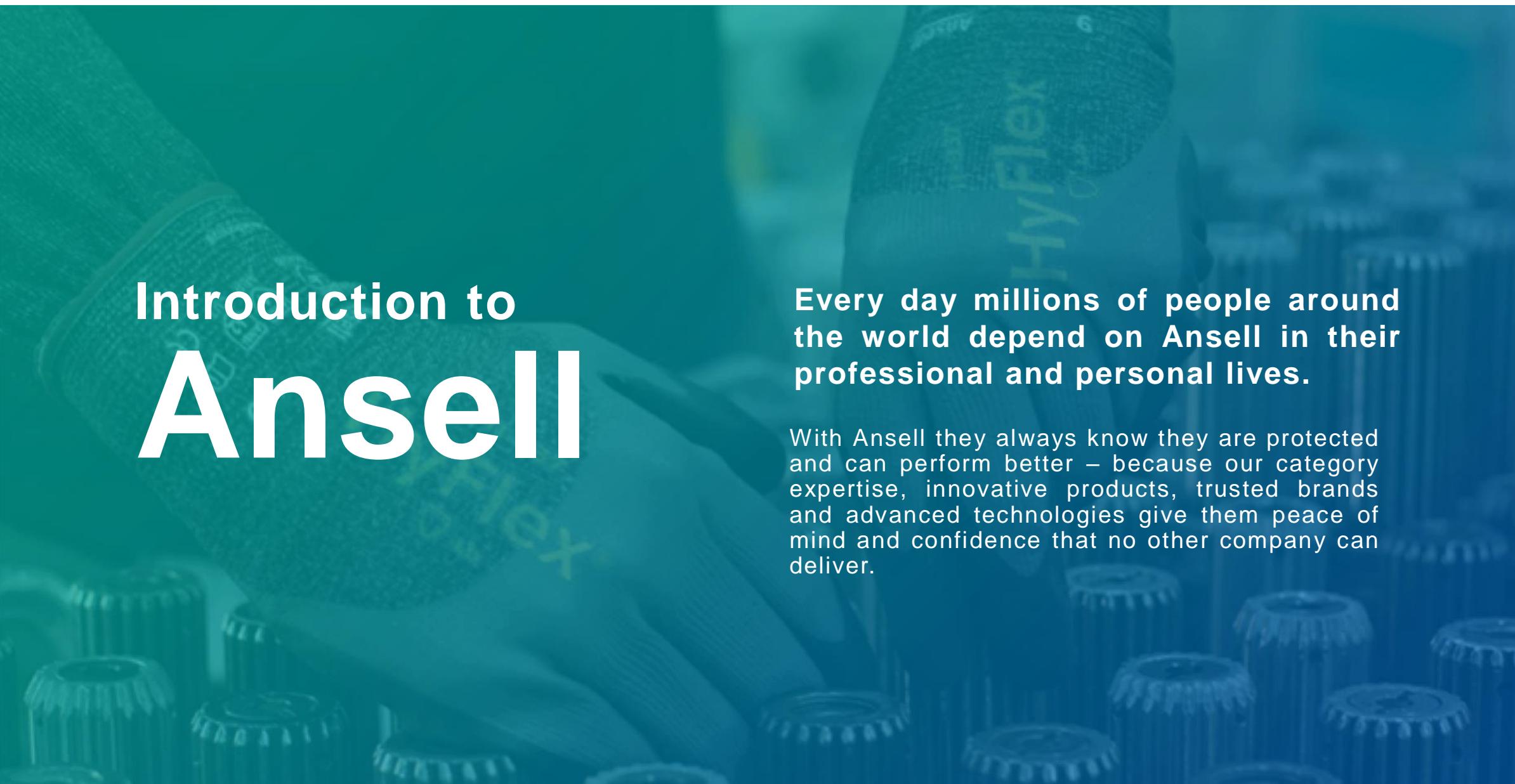
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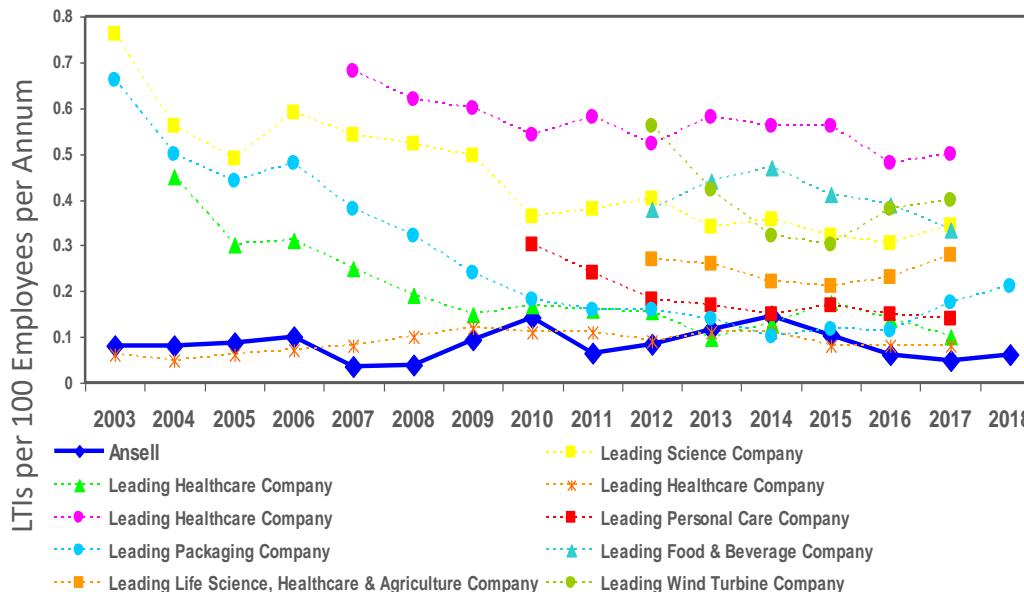
Introduction to Ansell

Every day millions of people around the world depend on Ansell in their professional and personal lives.

With Ansell they always know they are protected and can perform better – because our category expertise, innovative products, trusted brands and advanced technologies give them peace of mind and confidence that no other company can deliver.

Ansell, The Safety Company

LOST TIME INJURY (LTI)

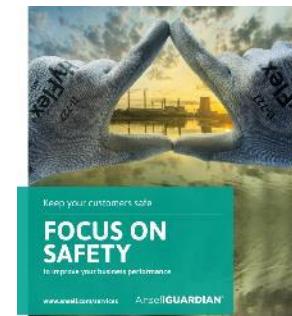


Ansell continues to record injury rates amongst lowest of global peers

Source: Bureau of Labor statistics and company websites

ANSELL SAFETY EXPERTISE

- Ansell maintains world-class safety levels
- Ansell Guardian® provides expertise to address complex chemical hazards, and recommend the best protection solutions
- Ansell's manufacturing safety focus includes monitoring total hours worked and adequate rest days taken
- Ansell remains focused on ethical and safe working practices, demands the same of its suppliers and welcomes increased international focus on this issue



Ansell**GUARDIAN**[®]
Global Safety Services



HyFlex® GAMMEX® AlphaTec® MICROflex®

An Illustration of Ansell's Safety Approach

The '3 Questions' safety awareness program was launched at Ansell locations in 2017 to promote worker awareness and build a culture of safety.

Translated into local languages, the posters remind workers to think before acting.

Ansell 

ASK YOURSELF

- 01** 
WHAT AM I DOING?
- 02** 
WHAT CAN GO WRONG?
- 03** 
HOW CAN I DO IT SAFELY?

BEFORE YOU START WORK

Unsafe work behavior causes 4 times as many accidents as unsafe work conditions.

YOUR SAFETY IS YOUR FIRST RESPONSIBILITY

Who We Are

Our mission is to provide innovative and effective solutions for safety, well-being, and peace of mind, no matter who or where you are.

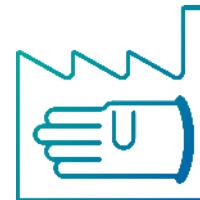
Every day, more than 12,000 people in 55 countries design, manufacture and market products on which millions of workers and healthcare professionals rely.



No. 1 or 2 position
in all key segments
globally



Provide protection
solutions to **more
than 25 specific
industries**



Sell
10 billion+
gloves per year



Average medical
professional personally
wears nearly **1,200
pairs of Ansell gloves**
per year



Protect more than
10 million workers
each day

Ansell is a Safety Company



LEADERSHIP



\$1.5B* global & innovative market leader specializing in safety products & solutions in a highly fragmented \$15B market



VISION



To be the world's best at providing safety solutions to customers globally, by helping customers use our leading products and services to achieve better results while operating safely



MISSION



Providing innovative solutions for safety, well-being and peace of mind, no matter who or where you are



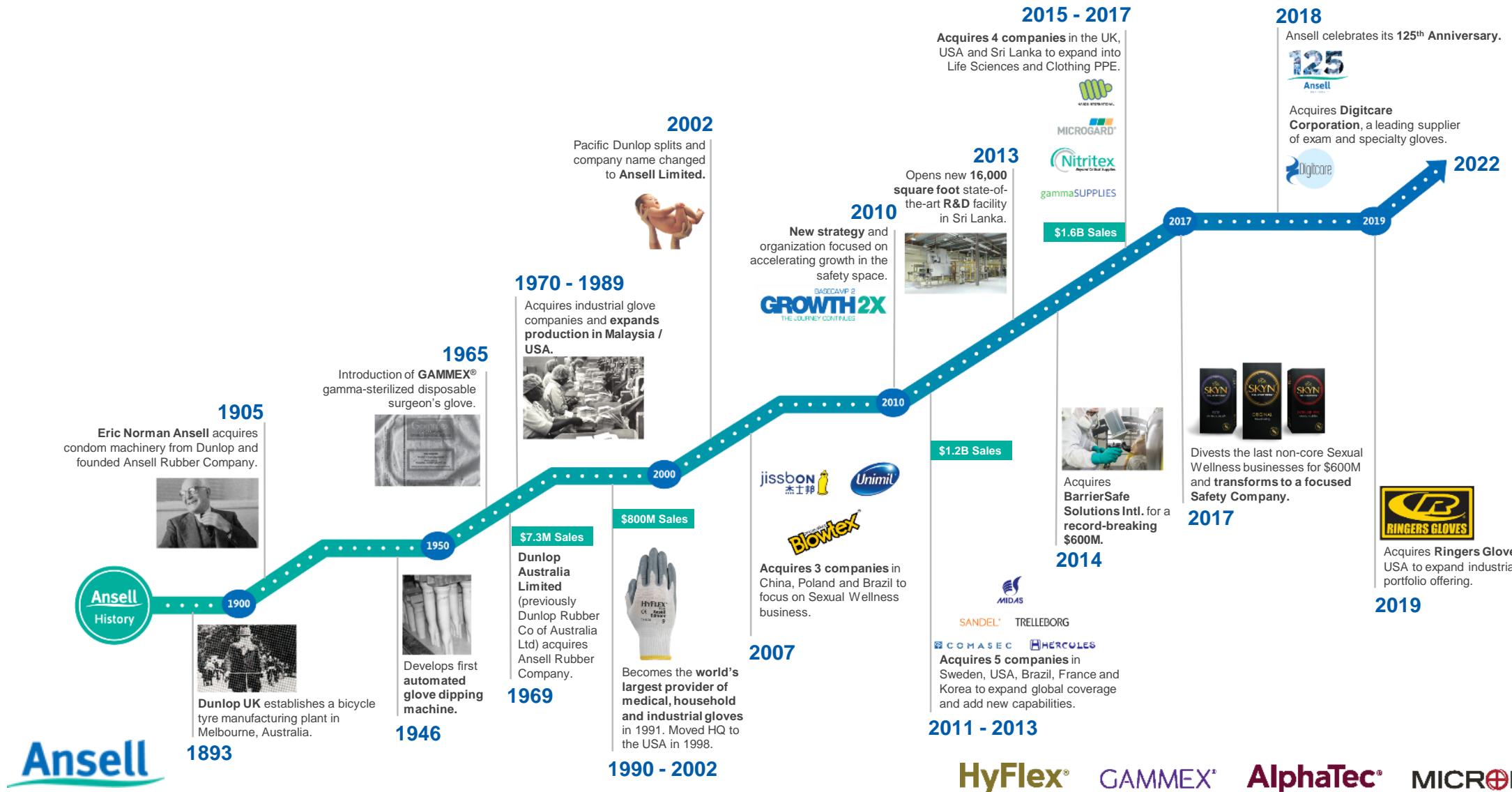
VALUES



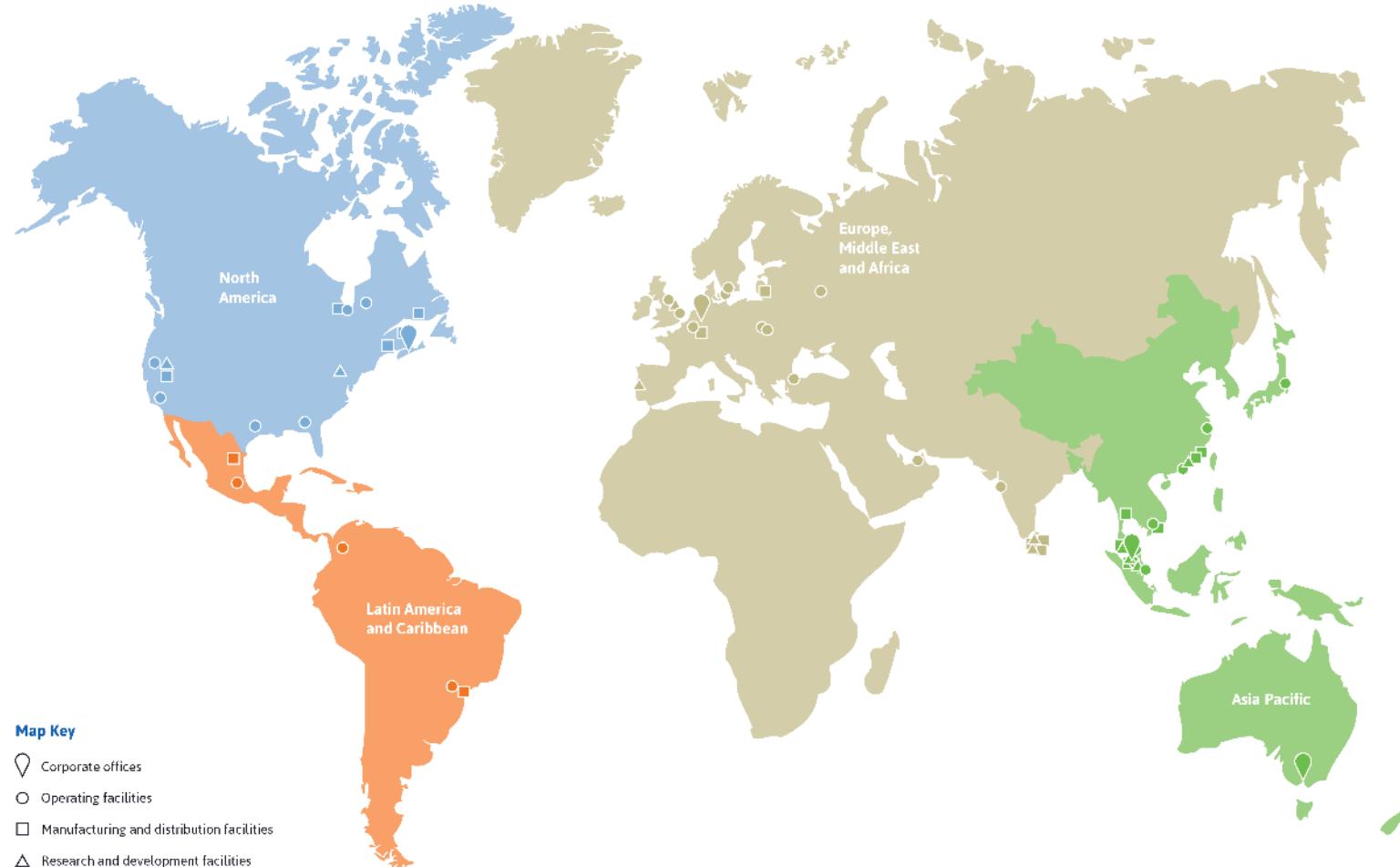
- **Integrity**
- **Trustworthiness**
- **Agility**
- **Creativity**
- **Passion**
- **Involvement**
- **Teamwork**
- **Excellence**

*Based on FY18 results for HGBU & IGBU

Ansell Timeline



Ansell's Global Footprint is Unique in the Industry



- Uniquely qualified to serve global accounts
- Allows increasing scale in each product type
- Do not have concentration risk in one country, distributor or customer

20+

Warehouses

600

Sales Force

Sales sites in

55

Countries

100+

Sales in Countries

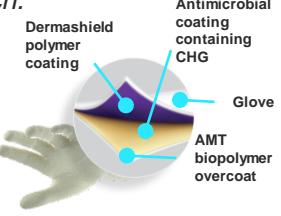
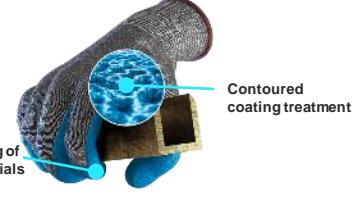
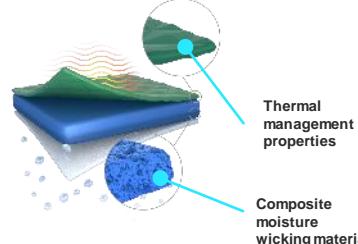
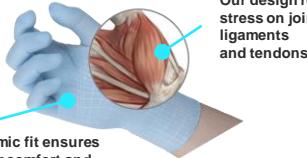
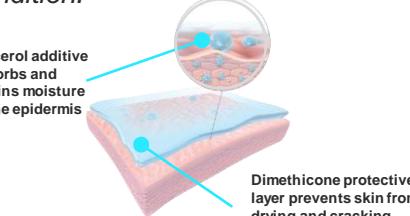
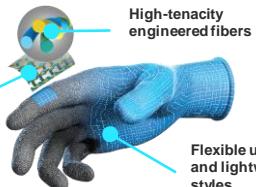
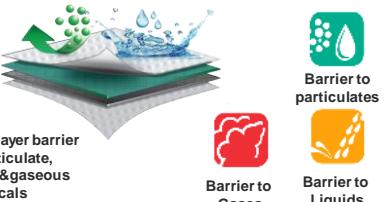
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Manufacturing Facilities

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R&D Facilities

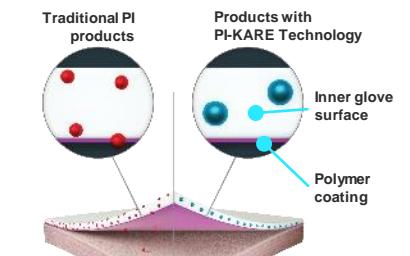
Ansell Technology Platforms are Protected by Patents and Methods

| | | | | |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>A.R.T™ Pinhole Barrier Technology</p> <p>A proprietary process integrated into the manufacturing line that helps add an extra level of robustness by minimizing possible defects that may later result in pinholes.</p> <p>A coating is applied over the glove former to seal any micro-defects, creating a smooth finish and delivering a consistent thickness across the glove. This minimizes irregularities that may later result in pinholes.</p>  | <p>AMT™ Antimicrobial Technology</p> <p>The use of chlorhexidine gluconate (CHG) on the inside of the glove suppresses the regrowth of bacteria on hands and prevents bacterial and viral migration in the event of a glove breach.</p>  | <p>ANSELL GRIP™ Ansell Grip Technology</p> <p>A coating treatment that minimizes the force required to grip dry, oily and wet tools or materials, reducing hand and arm fatigue while improving dexterity, safety and productivity.</p>  | <p>AQUADRI™ Moisture Management Technology</p> <p>A composite material that wicks perspiration into its micropores and disperses heat for a drier, cooler and more comfortable fit.</p>  | <p>DERMASHIELD™ Donning Aid Technology</p> <p>A proprietary inner coating for fast and easy damp or dry hand donning whether it is the first don or during intraoperative changes.</p>  |
| <p>ERGOFORM™ Ergonomic Design Technology</p> <p>A technology that enables Ansell to design safety solutions that support musculoskeletal health during repetitive tasks to improve worker performance.</p>  <p>Our design reduces stress on joints, ligaments and tendons</p> <p>Ergonomic fit ensures superior comfort and maximum range of motion</p> | <p>FORTIX™ Abrasion Resistance Technology</p> <p>Enhances the coating performance by integrating a resilient polymer formulation throughout the glove coating and/or in targeted high wear areas to extend the working life of the glove while improving worker comfort.</p>  <p>Thin, durable water-based coating</p> <p>A clean glove free from solvents</p> | <p>HYDRASOFT™ Skin Moisturizing Technology</p> <p>An odorless, water-based coating applied on the inside of the glove that helps retain moisture and rehydrate dry skin to improve the wearers' skin condition.</p>  | <p>INTERCEPT™ Cut Resistance Technology</p> <p>A blend of engineered, synthetic and natural fibers into high-performance yarns that provide high cut protection in targeted areas of cut risk, along with great comfort and high dexterity.</p>  | <p>MICROCHEM™ Chemical Barrier Technology</p> <p>Combines polymers in proprietary blends or multi-layer structures specific to their application, providing superior protection to wearers in chemical, biological, radiological and nuclear environments.</p>  <p>Multi-layer barrier to particulate, liquid & gaseous chemicals</p> <p>Barrier to Gases</p> <p>Barrier to Liquids</p> |

Ansell Technology Platforms are Protected by Patents and Methods

PI-KARE™ Skin-friendly PI Technology

Enables the elimination of standard chemical accelerators from polyisoprene (PI) gloves known to cause chemical Type IV allergies and sensitivities, making them safer to use.

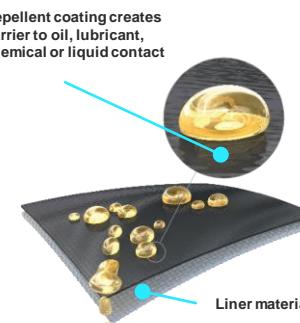


Standard chemical accelerators may not remain within the glove film and its residue, upon contact with skin, could result in Type IV chemical allergies and sensitivities.

Only biologically-safer chemical accelerators known to either be completely consumed during manufacturing or remain within the glove film and with better tolerance to skin, are used

RIPEL™ Liquid Repellence Technology

A repellent surface barrier that prevents oils, lubricants, chemicals or other liquids from making even incidental contact with the wearer's skin.

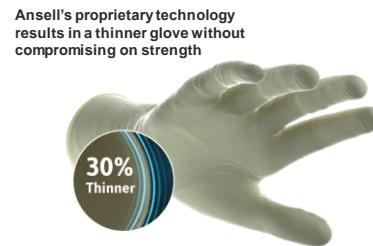


Repellent coating creates barrier to oil, lubricant, chemical or liquid contact

Liner material

SENSOPRENE™ Ultra Thin Neoprene Technology

Delivers a glove up to 30% thinner than Ansell's standard neoprene surgical gloves so wearers' experience a high degree of sensitivity without compromising on durability and the optimum skin protection needed from allergies and sensitivities caused by latex or chemical accelerators.

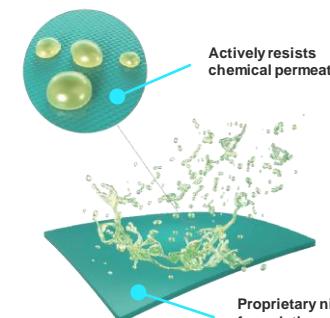


Ansell's proprietary technology results in a thinner glove without compromising on strength

30% Thinner

TNT™ Chemical Splash Resistance Technology

A proprietary polymer formulation that provides superior splash resistance against a wide range of hazardous chemicals, for durable protection with a soft, comfortable feel.

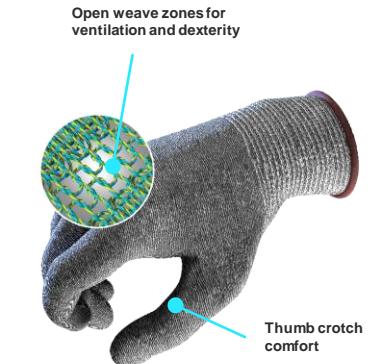


Actively resists chemical permeation

Proprietary nitrile formulation protects against a broad range of chemicals

ZONZ™ Comfort Fit Technology

Uses selected yarns and varying knit construction to optimize overall glove fit and enhance hand movement for higher dexterity and reduced fatigue.



Open weave zones for ventilation and dexterity

Thumb crotch comfort

Our Global Presence in Manufacturing

Ansell's manufacturing plants across the globe support our large sales force to deliver value to the user.

- Malaysia
- Sri Lanka
- Vietnam
- Portugal
- Thailand
- Lithuania
- China
- Brazil



INDUSTRIAL GLOBAL BUSINESS UNIT



HyFlex® GAMMEX® AlphaTec® MICRORFLEX®

IGBU – Who We Are

PRODUCTS

The broadest portfolio of hand and body protection solutions, engineered to solve customer's problems.

PRIMARY INDUSTRIES

Automotive

Machinery & Equipment

Oil & Gas

Utilities

Chemical

Metal Fabrication

Transportation

Food & Agriculture

KEY GROWTH BRANDS

HyFlex®

AlphaTec®

EDGE®

ACTIVARMR®

TECHNOLOGY BRANDS

 **ANSELL GRIP™**
Ansell Grip Technology

 **AQUADRI™**
Moisture Management Technology

 **FORTIX™**
Abrasion Resistance Technology

 **INTERCEPT™**
Cut Resistance Technology

 **MICROCHEM™**
Chemical Barrier Technology

 **RIPEL™**
Liquid Repellence Technology

 **ZONZ™**
Comfort Fit Technology

SERVICES

Ansell**GUARDIAN®**
Global Safety Services

SALES & SERVICE SUPPORT

370



IGBU: Key Facts



HyFlex®
~\$275m+ **#1**

The world's most recognized hand protection brand

\$716m

Revenue in >100 countries

\$87m EBIT

Strong innovation pipeline

\$100m+

In new product sales

80%

In-house manufacturing value

250+/month

Guardian Safety assessments driving an average 65% injury reductions at end user sites

10%

Growth brand organic sales growth

**HyFlex® AlphaTec®
EDGE® ACTIVARMR®**

6

State-of-the-art R&D centers independently accredited and certified generating 400+ technology patents

20%

Outsourced manufacturing value

IGBU: 2 Key Platforms

| | | MECHANICAL | CHEMICAL | |
|-------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------|------------------------------------------------------------------------------------------------------------------------------|---------------------|
| ANNUAL F18 GLOBAL SALES* | >\$450m | | >\$265m | |
| GROWTH BRANDS |    | | | |
| KEY PRODUCTS | Industrial Cut Gloves & Sleeves | Multi-Purpose Gloves & Sleeves | Multi-risk Chemical Protective Gloves & Apparel | |
| | Impact, Thermal, and Specialty Gloves & Sleeves | OEM / Retail Gloves | Food Processing & Janitorial Gloves | OEM / Retail Gloves |
| CORE PROCESS & MATERIALS | Knitting & Dipping, Cut & Sew Engineered Yarns, NBR, NRL, PU, PVC Polymer Dips | | Lined and unlined polymer dipping including Nitrile, NRL & Neoprene Lamination and assembly of multi-layer barrier materials | |
| CORE MANUFACTURING FACILITIES | Sri Lanka, Vietnam & Portugal | | Malaysia, China, Thailand, Sri Lanka & Lithuania | |

* Annual Global Sales adjusted for cross-selling between SBUs

Overview of Mechanical Portfolio

MECHANICAL RISK PROTECTION

By understanding safety professionals' day-to-day needs and experiences within industrial environments, the mechanical portfolio of solutions is designed and engineered to provide the optimal balance of comfort, performance, and protection against mechanical risks such as cut, abrasion, and oil exposure.

HyFlex®

11-840*

Best Seller is now Better than Ever
with 20% Longer Wear Time

With our **New and Improved** FORTIX™ Abrasion Resistance Technology, the HyFlex® 11-840 provides extreme durability, improved grip, comfort and dexterity for a better, safer day at work.



* Available in FY20

HyFlex Range: Gloves & Sleeves for Cut Protection, Oil Protection, Multi-Purpose Protection

Ansell

HyFlex®

11-542

Extreme Comfort & Protection
in High Cut Risk Applications

Made with Ansell INTERCEPT™ Cut Resistant Technology, the HyFlex® 11-542 delivers higher level of protection against cuts. Lightest weight design for comfort and dexterity, supporting worker compliance and an uninterrupted workday.



FAST FACTS

- Leading Position in Cut & Multi-Purpose Hand Protection Segments
- Growing Specialty Segment
- Ansell's Most Profitable Core Brand Growth
- Ansell's Most Innovative Portfolio
- Trusted brands

ACTIVARMR®

97-631

Feel everything
but the cold

Provides an industry-leading combination of comfort, warmth, and dexterity in cold conditions. The ActivArmr® 97-631 has a unique two-layer design for comfort and maximum flexibility.



EDGE®

48-126

Abrasion resistance & grip
with high tactility

With EN level 4 abrasion, tear resistance, and grip, the EDGE® 48-126 provides a value-oriented, dependable solution vs traditional cotton / canvas gloves.



ActivArmr Range: Thermal, vibration, electrical and welding gloves & sleeves

EDGE Range: Mechanical product + worker protection gloves

Overview of Chemical Portfolio

FAST FACTS

- From Trusted Classics in Chemical Protection to Innovative, High-end Multi-hazard Protection
- Broadest Portfolio of Hand & Body Chemical Protection Solutions
- Serving High-risk Industrial Markets Including; Chemical, Oil & Gas, Life Sciences and Energy

Feel EQUIPPED™

The broadest range of best in class multi-hazard chemical protection solutions, to allow you to work safely, with increased confidence and Feel EQUIPPED™

Ansell GUARDIAN® PARTNER

Ansell Guardian™ Partner facilitates the selection of the right chemical protection solution to improve safety, productivity and cost performance.



AlphaTec® 2000

Breathable Protection



Superior protection from low hazard liquid spray and fine particulates, with bound seams for improved overall protection.

AlphaTec® 4000

Unique, innovative multi-layer chemical barrier



Engineered to provide an exceptional barrier against a wide range of organic and inorganic chemicals and biological agents.

AlphaTec® EVO

An "All inclusive" hazmat suit



Top-of-the-line industrial chemical and warfare agent protection for critical-risk environments and HAZMAT response.



AlphaTec® Solvex®

Versatile chemical protection



Iconic, high comfort, chemical resistant glove for a diverse range of applications.

With good grip, fit & comfort

AlphaTec® 58-735

Don't choose between chemical or cut protection, have both!



Product of the Year* - Multi-hazard chemical + cut protection in one glove. Innovative design & manufacturing technique provides superior wearer comfort.

AlphaTec® 53-001

A smarter choice for broader chemical protection



Innovative "2 in 1" nitrile + neoprene layering technology.

To provide protection against a broader range of chemicals than nitrile or neoprene gloves alone.

*OHS (Occupational Safety and Health)
<https://ohsonline.com/pages/product-awards.aspx?m=1>

HyFlex®

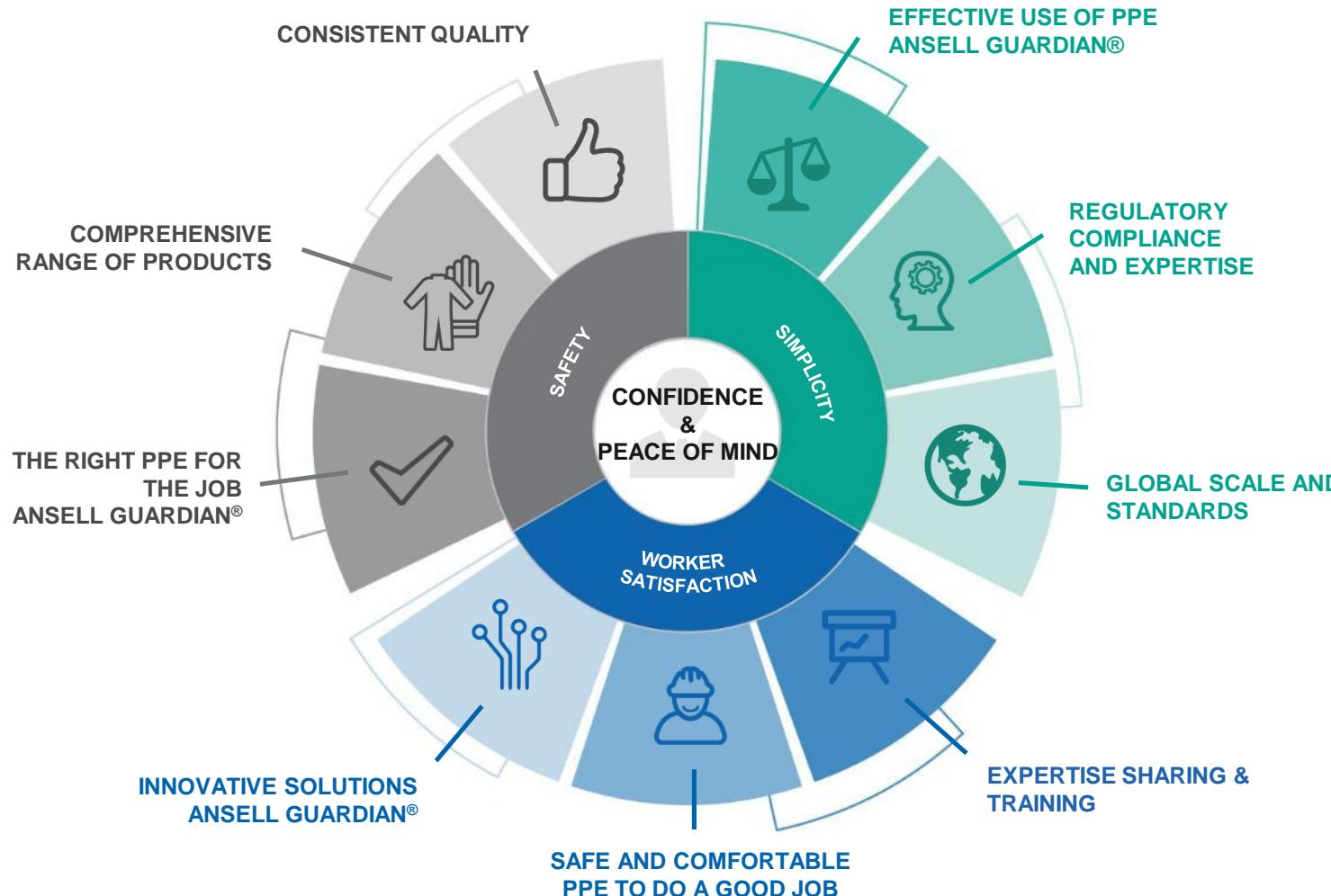
GAMMEX®

AlphaTec®

MICROFLEX®

Ansell

Industrial Value Proposition - for End Users



Our product and service solutions for hand and body protection help:



Ansell GUARDIAN® – What It Is

VALUE PROPOSITION

Ansell GUARDIAN® is our service to help select the right personal protective equipment solutions to improve workplace safety, productivity and cost effectiveness.

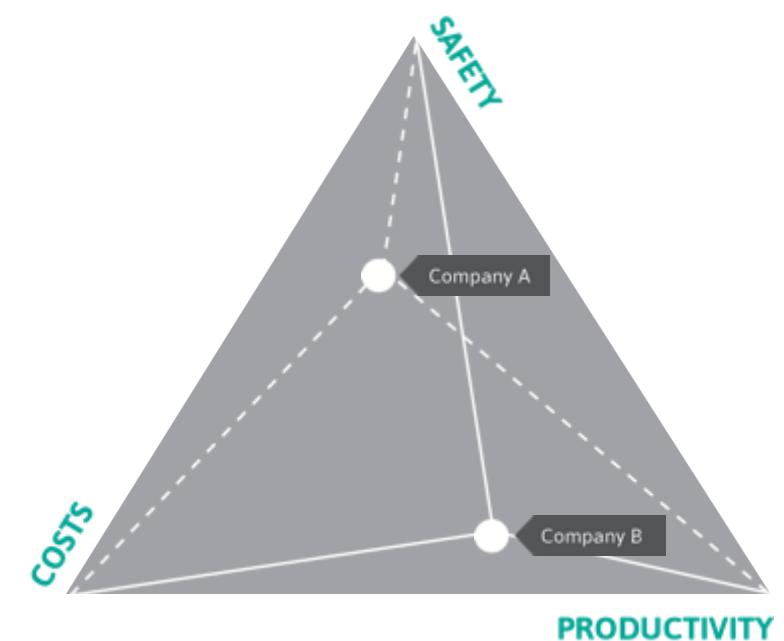
WHY BELIEVE US?

- Experience:** More than 15,000 assessments conducted worldwide since 2010.
- Results:** Since July 2013, our recommendations have reduced injuries by an average of 65% and we have saved companies a total of \$165M across 6,000 assessments.
- Global:** We operate in more than 55 countries.
- Technology:** Industry pioneer with the most advanced proprietary technologies and analytics.

OUR OPERATING PRINCIPLES

- Partnership:** We share our expertise to analyze, benchmark, implement and improve PPE-related operations and performance.
- Adaptation:** No matter what business, industry or application, we tailor and adapt solutions based on data-driven analytics.
- Transformation:** Full implementation of our recommendations ensure the success of PPE change management initiatives.

AnsellGUARDIAN®
Global Safety Services





HyFlex® GAMMEX® AlphaTec® MICR⁺FLEX®