Introducing

The SAES® Getters Group

Lainate, June 2005
Core Business

The SAES® Getters Group is the world leader in a variety of scientific and industrial applications where stringent vacuum conditions or ultra-high pure gases are required.
Core Business

For nearly 60 years, our getter solutions have been supporting technological innovation in:

- The information display industry
- The lamp industry
- Ultra-high vacuum systems
- A wide range of electronic device-based applications
- Vacuum thermal insulation
- Semiconductors
Research & Innovation

- Average of 8% of net consolidated sales allocated to R&I activities every year
- State-of-the-art corporate laboratories covering a surface of over 3,300 sq.mt.
- Nearly 100 people committed to investigating problems, developing proposals and testing solutions
Over 300 inventions have been patented by the Group in 60 years of activity, in the following business segments:
Business Organization

- **Information Displays Business Unit**
  Components based on the getter technology and used in displays (cathode ray tubes and flat panel displays)

- **Industrial Applications Business Unit**
  Components based on the getter technology and used in a wide variety of industrial applications (lamps, electronic devices, vacuum systems) and capital equipment employed primarily in the semiconductor industry for pure gas handling

- **Advanced Materials Business Development Unit**
  Advanced materials supporting some of the most innovative technologies: optical crystals, shape memory alloys, getter thin films for wafer-level MEMS, catalytic diesel filters and metalorganic precursors
2004 Sales by Business Unit

- Industrial Applications: 41%
- Information Displays: 59%
Business Organization

Information Displays BU
- Cathode Ray Tubes BA
- Flat Panel Displays BA

Industrial Applications BU
- Lamps BA
- Vacuum Systems & Thermal Insulation BA
- Electronic Devices BA
- Semiconductors BA
SAES Getters is the Cathode Ray Tube (CRT) industry’s leading provider of getters:

- Yearly production capacity of 250 million barium getter pieces
- In-house vertically integrated manufacturing processes
- A large and consolidated customer base
- A controlled risk management policy based on total production distribution at 3 manufacturing facilities
- 1st qt 2005 sales: 8.7 M€ 27% of total (45 M€ in 2004)
Flat Panel Displays

As a strategic supplier of technology innovation, SAES Getters serves the flat panel display industry with getter, dryer and mercury dispensing solutions for:

- LCD backlighting
- Plasma displays
- Field Emission Displays (FEDs)
- Vacuum Fluorescent Displays (VFDs)
- Organic Light Emitting Diode displays (OLEDs)

1st qt 2005 sales: 10.3 M€ 32% of total (38.2 M€ in 2004)
SAES Getters fully addresses key issues of the lamp industry related to vacuum purity maintenance, filling-gas purity and lamp processing for:

- Street lighting
- Industrial lighting
- Commercial lighting

SAES “green” mercury dispensers support the most important fluorescent lamp manufacturers in complying with the stringent mercury dosing regulations and thus in ensuring minimal environmental impact of their products.

- 1st qt 2005 sales: 2.9 M€ 9% of total (11.2 M€ in 2004)
Electronic Devices

This Business Area offers solutions for an extremely diversified range of devices, whose functioning requires either vacuum or a high purity rare gas atmosphere.

Among the targeted market segments:

- Avionics
- Medical
- Security & defense
- Telecom & datacom
- Automotive

1\textsuperscript{st} qt 2005 sales: 3 M€ 9% of total (11.6 M€ in 2004)
Expertise in gas-surface interaction, vacuum technology, outgassing and permeation of materials has led the Group to the development of non-evaporable getter pumps and solutions for vacuum systems and vacuum thermally insulated devices:

- Vacuum systems for material characterization and processing
- Particle accelerators
- Cryogenic applications
- Solar energy collectors and pipes
- 1st qt 2005 sales: 1.4 M€ 4% of total (5.8 M€ in 2004)
Semiconductors

Development and marketing of advanced gas purification technologies supporting the semiconductors and other hi-tech industries is the mission of this Business Area.

Providing purification for ultra-high purity bulk gases and specialty gases, SAES Pure Gas – member company of the SAES Getters Group – offers a product portfolio tailored to a wide range of flow rates and gas applications.

- 1st qt 2005 sales: 5.9 M€ 18% of total (29.8 M€ in 2004)
Business Organization

Advanced Materials BDU

Getters for MEMS BDA

Shape Memory Alloys BDA

Optoelectronic Materials BDA

Metalorganic Materials BDA

Catalysis BDA
Getters for MEMS

Mission of this Business Development Area is engineering and marketing of thin film getter products for:

- Wafer-level packaged Micro Electro Mechanical Systems (MEMS)
- Hydrogen-sensitive packages

Getter films deposited onto MEMS cap-wafers improve the vacuum level and increase reliability and lifetime of the final device.
Shape Memory Alloys

Mission of SAES’ Shape Memory Alloys (SMA) Business Development Area is to deliver state-of-the-art shape memory and superelastic components for industrial and niche high-technology applications, such as:

- Automotive
- Transportation
- Domotics
- Eyewear
- Medical

In-house vertically integrated process, from ingot to SMA component manufacturing, is SAES Getters’ distinctive mark.
Optoelectronic Materials

By delivering advanced optical crystals to the optoelectronic device and solid-state laser marketplace this Business Development Area offers customers a real competitive advantage as a reliable supplier of added-value photonic materials.

With the plus of a multi-disciplinary know-how that allows the mastering of growth and manufacturing strategic processes.
Metalorganic Materials

This Business Development Area aims at developing premium quality metalorganic precursors for a wide range of electronic and microelectronic metal organic chemical vapor deposition applications:

- Ferroelectric memories
- High-k dielectrics
- Electric-ceramic thin films
- Superconductors
This Business Development Area aims at developing, in the frame of a partnership, a **Catalytic Diesel Filter** for the abatement of soot emissions from heavy-duty/stationary engines.

We have developed an innovative technology to deposit a thin catalytic coating on metal fibers finalised at the filter performances improvement.
2004 Sales by Geographic Area

- Japan: 23%
- Rest of Asia: 41%
- North America: 18%
- Rest of Europe: 15%
- Italy: 1%
- Rest of the World: 2%
Consolidated Operating Income (% on net sales)

* 2003 Consolidated Operating Income excluding one time costs: approx. 9M€ (7.1% on sales)
Consolidated Net Income
(% on net sales)

* 2003 Consolidated Net Income excluding one time items: approx. 4M€ (3.2% on sales)
Thank you for your attention

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