



HEXCEL
GLOBAL LEADER IN ADVANCED COMPOSITES
TECHNOLOGY

HEXCEL IS A
GLOBAL LEADER
 IN ADVANCED COMPOSITES
 TECHNOLOGY

2020 Sales | **\$1.5 billion**

Leading, sole source positions in key markets with **high barriers to entry**

Sustainable **competitive advantage**

Excellent **customer relationships**

Increasing share of **long-term growth** markets

Long history of **creating shareholder value**

SCOPE AND BREADTH

Leading composites manufacturing company



23

MANUFACTURING SITES

Corporate Headquarters
Stamford, CT USA

4

CONTINENTS

North America, Europe, Asia, Africa



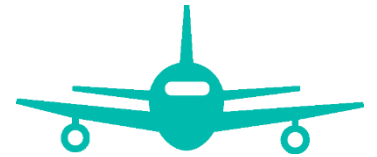
4,800+

PEOPLE

73

YEARS IN BUSINESS

Founded in a California garage in
1948



3

MAJOR MARKETS

Commercial Aerospace, Space
and Defense, and Industrial

INDUSTRY-LEADING MARKET POSITIONS

- Our technology enables sole source positions with high barriers to entry
- We offer innovative, high-value materials and products
- Composite content is growing in technology-intensive markets
- Ramp-up in build rates for composite-intensive programs creates growth

30%

SPACE & DEFENSE
Rotorcraft
Military Aircraft
Launch Vehicles
Satellites

15%

INDUSTRIAL
Wind Energy
Automotive
Recreation
Marine
Other

55%




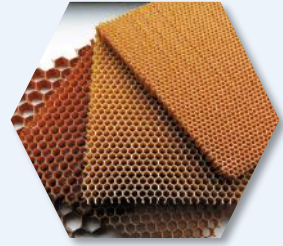
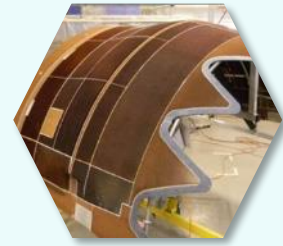
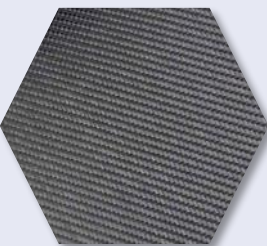
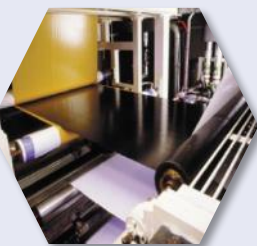

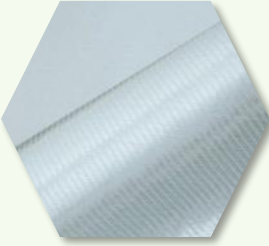
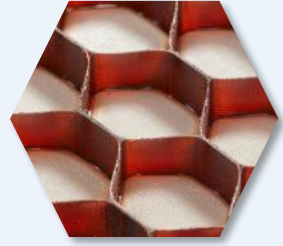

COMMERCIAL AEROSPACE
Airbus and Boeing
Engines/Nacelles
Regional/Business



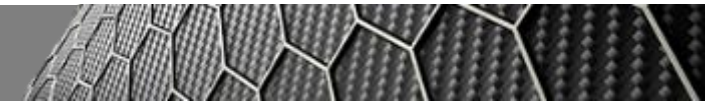
Growth fueled by composite penetration and technology innovation

UNRIVALED PRODUCT RANGE

Everything from carbon fibers, reinforcement fabrics, and resins to prepregs, honeycomb core, tooling materials and more . . . from raw materials to fly-away parts . . . **vertical integration is a strength and a differentiator**

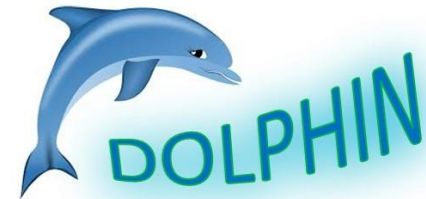
Carbon Fiber & Prepregs	<p>PAN Polyacrylonitrile precursor</p> 	<p>CARBON FIBER Continuous and Chopped</p> <p>A320neo sharklets F-35 wings LEAP fan blades/case</p> 	Glass Prepregs	<p>GLASS PREPREGS</p> <p>Wind turbine blades Aerospace secondary structures</p> 	Honeycomb	<p>HONEYCOMB</p> <p>Rotorcraft blades Aircraft flooring Nacelle structures Acousti-Cap®</p> 	Engineered Products	<p>ENGINEERED PRODUCTS</p> <p>Structural assemblies Machine/shaped core Tooling system</p> 	
	<p>REINFORCEMENTS</p> <p>Aerospace primary and secondary structures</p> 	<p>CARBON PREPREGS</p> <p>A350 fuselage and wings GE90 fan blade</p> 		<p>ADDITIVE MANUFACTURING</p> <p>Thermoplastic, carbon fiber reinforced 3D printed parts for Aerospace</p> 					
	<p>Strong stiff lightweight fatigue resistant corrosion resistant</p>								

Strong | stiff | lightweight | fatigue resistant | corrosion resistant



ROLE OF HEXCEL IN THE DOLPHIN PROJECT

- Carbon fabrics for gas diffusion layer production
- Carbon composite sheets for application in bi-polar plate
- Composite terminal plates
- Involvement of 3 sites: AUT/FR/UK



Disruptive pemfc stack with nOvel materiaLs,
Processes, archItecture and optimized INterfaces



Disclaimer

This document and all information contained herein is the sole property of Hexcel Corporation. No intellectual property rights are granted by the delivery of this document or the disclosure of its content.

This document shall not be reproduced or disclosed to a third party without the express written consent of Hexcel. This document and its content shall not be used for any purpose other than that for which it is supplied.

The statements made herein do not constitute an offer. They are based on the mentioned assumptions and are expressed in good faith. Where the supporting grounds for these statements are not shown, Hexcel will be pleased to explain the basis thereof.