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This document does not constitute an offer to sell, or a solicitation of an offer to buy Tarkett shares in any jurisdiction.
GROUP STRATEGY

> Market overview and Tarkett positioning

> Tarkett since the IPO

> 2017-2020 strategy

> 2017-2020 financial objectives
GROUP STRATEGY

Market overview and Tarkett positioning
Global flooring market

- Flooring market is growing more or less in line with GDP growth, with specificities by region and product

- Flooring market (excluding ceramics) is ~80% exposed to renovation

- Flooring market is a very traditional industry where customers value reputation and long term relationships

World flooring market = 12.5bn sqm*

- Ceramics 62%
- Wood & Laminate 11%
- Vinyl, Linoleum & Rubber 8%
- Commercial Carpet 6%
- Residential Carpet 10%
- Other non-resilient 3%

Flooring preferred categories vary greatly across the world

Market growth assumptions

LEADING INDICATORS

> No official statistics regarding market shares in the flooring market
> Europe: Euroconstruct
> North America: ABI, US Census housing starts
> Russia: real wages, consumer confidence
> National industry organizations

TARKETT ASSUMPTIONS REGARDING MARKET GROWTH (2017-2020 CAGR)

> Europe: +0% to +2%
> North America: +2% to +4%
> CIS: +0% to +3%
> Sports: +3% to +7%

Strong customer needs for modularity leading to significant growth opportunity in Luxury Vinyl Tiles (LVT)
Tarkett is a global leader in flooring and sports surfaces with a regional manufacturing footprint

- **Net sales:** €2.7bn
- **Adj. EBITDA:** €285m
- **1.3m sqm of flooring sold each day**
- **Sales in more than 100 countries**
- **12,000 employees**
- **34 Industrial sites**

**Figures as of December 31, 2015.**
Tarkett benefits from balanced exposures providing resilience to industry cycles

**BALANCED GEOGRAPHIC EXPOSURE**
Sales in more than 100 countries

- NORTH AMERICA incl. Sports 44%
- EMEA incl. Sports 36%
- CIS, APAC & LATAM 20%
- 30% NA

**ONE OF THE BROADEST PRODUCT PORTFOLIOS IN THE FLOORING INDUSTRY**

- Sports 17%
- Rubber & Accessories 7%
- Wood & Laminate 7%
- Commercial Carpet 21%
- Vinyl & Linoleum 48%

**ATTRACTIVE END-MARKETS EXPOSURE**

- Education
- Health & Aged Care
- Workplace
- Stores & Shops
- Hospitality, Travel & Leisure
- Marine, Aviation & Transport
- Industry
- Sports & Wellness

Figures based on 2016 Estimates Sales.
Tarkett has acquired one of the broadest product offerings in the industry

<table>
<thead>
<tr>
<th>RANKING BASED ON LATEST SALES DATA</th>
<th>CERAMICS</th>
<th>VINYL &amp; LINOLEUM</th>
<th>CARPET</th>
<th>WOOD &amp; LAMINATE</th>
<th>RUBBER</th>
<th>TURF &amp; TRACKS</th>
<th>#PRODUCT CATEGORIES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mohawk</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
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<td>✔️</td>
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<tr>
<td>Shaw</td>
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<td>Tarkett</td>
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<tr>
<td>Armstrong Flooring</td>
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<td>Interface</td>
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<td>Gerflor</td>
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<td>Forbo</td>
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<td>Beaulieu America</td>
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<tr>
<td>** TOTAL **</td>
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<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>2</td>
</tr>
</tbody>
</table>

Sources: Company information and Tarkett estimates.

Note: List excludes pure Ceramics players; Flooring only for Armstrong, Beaulieu and Forbo.
Tarkett is number 3 worldwide flooring player with leadership positions in many categories and regions

#1 worldwide positions

Vinyl

Artificial Turf in sports fields

#1 regional positions

Flooring CIS

Running Tracks North America

Accessories North America
Tarkett has developed a true “Glo-cal” competitive advantage

GLOBAL SCALE LEVERAGE
- Purchasing negotiation power
- Research & innovation
- Best-in-class industrial processes benchmarks

LOCAL STRENGTHS
- Regional design centers
- Optimization of industrial and logistics footprints
- Sales forces with long-standing client relationships

“Glo-cal” competitive advantage
- Recognized expertise in each market segment
- Design adapted to local taste and trends
- Price competitiveness
- High level of service

Tarkett Investor Day – October 27, 2016
GROUP STRATEGY

Tarkett since the IPO
Strong performance despite CIS headwinds

- Strong resilience during CIS downturn
- Successful strategic acquisition and integration of Desso
- North America back on track
- Dynamic organic growth and margin expansion in Sports
- ~€120m productivity improvements through restructuring and company-wide lean manufacturing (WCM)

**NET SALES**

<table>
<thead>
<tr>
<th></th>
<th>2013</th>
<th>CIS, APAC &amp; LATAM</th>
<th>Perimeter Currencies</th>
<th>Other divisions</th>
<th>2016E</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2,516</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>~350</td>
<td></td>
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<td></td>
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</tbody>
</table>

**ADJUSTED EBITDA**

<table>
<thead>
<tr>
<th></th>
<th>2013</th>
<th>CIS, APAC &amp; LATAM</th>
<th>Perimeter Currencies</th>
<th>Other divisions</th>
<th>2016E</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>310</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>~115</td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>11.5% to 12.2%</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>12.3%</td>
</tr>
<tr>
<td></td>
<td>315 to 330</td>
</tr>
</tbody>
</table>
Tarkett in 2016: an attractive geographical exposure

Sales breakdown

2013

- **NORTH AMERICA incl. Sports**: 36%
- **EMEA incl. Sports**: 29%
- **27% EMEA**
- **27% NA**
- **CIS, APAC & LATAM**: 35%

Sales: **€2,516m**

2016 estimated

- **NORTH AMERICA incl. Sports**: 44%
- **EMEA incl. Sports**: 36%
- **17% EMEA**
- **30% NA**
- **CIS, APAC & LATAM**: 20%

Sales: **€2,700m to €2,750m**
Tarkett in 2016: a balanced profitability profile

Adjusted EBITDA breakdown

### 2013

- **North America**: 21%
- **EMEA**: 21%
- **Sports**: 4%
- **CIS, APAC & LATAM**: 54%

Total: €310m

### 2016 estimated

- **North America**: 30%
- **CIS, APAC & LATAM**: 20%
- **EMEA**: 37%
- **Sports**: 13%

Total: €315m to €330m
Follow-up on IPO guidance (2013-2016)

**Net sales from organic growth**
- 2012-2016 organic sales CAGR continues to outperform aggregate GDP growth in the regions where we are present
  - Achieved in 3 of 4 segments

**Additional sales from acquisitions**
- Objective of c. €300m additional sales by 2016 coming from value-accrative acquisitions
  - 80% completed

**Profitability & return**
- Objective is to maintain EBITDA margin in excess of 12% as well as a ROCE above 15% on average
  - Challenged by CIS macro

**Ongoing Capex**
- Ongoing Capex circa 3.5% of net sales
  - ✔

**Leverage**
- Net debt below 2.0x EBITDA unless transforming acquisitions
  - ✔

**Dividend**
- Dividend pay-out ratio of approximately 40% of net income, subject to any major external growth development
  - ✔
Long term profitable growth

**NET SALES**
in €m

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales (€m)</td>
<td>1,708</td>
<td>1,919</td>
<td>2,088</td>
<td>2,292</td>
<td>2,516</td>
<td>2,414</td>
<td>2,715</td>
<td>2,700 to 2,750</td>
</tr>
</tbody>
</table>

**ADJUSTED EBITDA**
in €m

<table>
<thead>
<tr>
<th></th>
<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>EBITDA (€m)</td>
<td>208</td>
<td>222</td>
<td>191</td>
<td>262</td>
<td>310</td>
<td>275</td>
<td>285</td>
<td>315 to 330</td>
</tr>
</tbody>
</table>

**CAGR**

- **NET SALES**: +6.9% CAGR 2009-2016E
- **ADJUSTED EBITDA**: +6.5% CAGR 2009-2016E
GROUP STRATEGY

2017-2020 strategy
OUR VISION

Be the global leader in innovative solutions that generate value for customers in a sustainable way.
Tarkett strategy for a sustainable and profitable growth

**STRATEGY**

- Deliver outstanding customer experience
- Lead in design, innovation & sustainability
- Excel in sales and operations
- Create additional value with acquisitions

**OBJECTIVE**

- Grow faster and be more profitable than our competitors

**VISION**

- Be the global leader in innovative solutions that generate value for customers in a sustainable way

**VALUES**

- Positive customer attitude
- Team spirit
- Respect and integrity
- Empowerment and accountability
- Commitment to the environment
Tarkett four strategic pillars

- Deliver outstanding customer experience
- Lead in design, innovation & sustainability
- Excel in sales & operations
- Create additional value with acquisitions
Our customers are all stakeholders of the construction industry

Tarkett provides *life-long benefits to owners*: sensorial, technical, ecological, financial

Tarkett helps *them grow their business*: winning customers, being more productive and more profitable

---

**RESIDENTIAL**

- Home owner
  - Retailer
  - Contractor, installer
  - Wholesaler

**COMMERCIAL**

- Building/Project owner
  - Specifier (architect, designer, facility manager...)

Deliver outstanding customer experience
# Tarkett ambition

<table>
<thead>
<tr>
<th>From flooring provider</th>
<th>to solutions partner</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supplying parts of flooring</td>
<td>Owning entire floor space</td>
</tr>
<tr>
<td>Flooring generalist and (mono) product push</td>
<td>Segment specialist and customer-oriented pull (multi-products &amp; services)</td>
</tr>
<tr>
<td>Focus on historical core segments (housing, healthcare, education) &amp; their stakeholders (distributor/installer)</td>
<td>Broaden focus on new, unexplored segments &amp; their stakeholders (architect &amp; designer/end-user)</td>
</tr>
<tr>
<td>Relational selling</td>
<td>Consulting (up-)selling</td>
</tr>
<tr>
<td>Face-to-face selling</td>
<td>Multi/Omni-channel selling providing digital touch-points</td>
</tr>
<tr>
<td>Sum of independent customer touch-points</td>
<td>Hassle-free and consistent customer experience across Tarkett organizations</td>
</tr>
</tbody>
</table>

Create value for our customers with innovative solutions ... 

... and provide ultimate customer experience
Digitalization offers a seamless, value-adding and differentiated customer journey

Example of two customer journeys
The preferred solutions partner

CUSTOMERS NEEDS

RELIABLE
“I want to work with a reliable and trustful partner”

HELP and ADVICE
“I want support in my daily job to grow my business”

PERSONALIZATION
“I want consideration and personalized services”

TARKETT STRATEGIC FOCUS

Supply chain & logistics
Sales & customer service

Product selection & design
Business partner

Personalized solutions
Long-lasting relationships
The reliable partner

Supply chain & logistics

> Increase flexibility of manufacturing and optimize product portfolio management to improve customer service

Sales & customer service

> Deploy advanced CRM integrating data from multi-touch-points, with easy access to sales and customer service teams
> Build a unified product database, backbone of new Tarkett websites and connect to architects & designers standard software (BIM)

Deliver outstanding customer experience
Help and advice

Product selection & design

> Make the on & off-line selection process easy at each step of the customer project phase (technical advice, reference library, room visualizer)

Business partner

> Provide support to architects & designers and installers (on-line design support during the RFQ phase, quick sampling service)

> Provide marketing tools and training support for distributors and installers (distributor website, installation training & guide)
Personalization

**Personalized solutions**

- Offer design and solutions that help the designer to **create innovative and unique spaces**
- Adapt process and services to **modularity** and **mass-customization**

**Long-lasting relationships**

- **Strengthen intimacy providing high-level of consideration**, including after-sales
- Measure and **improve customer satisfaction** through net promoter score (**NPS**)
Four strategic pillars

- Deliver outstanding customer experience
- Lead in design, sustainability & innovation
- Excel in sales & operations
- Create additional value with acquisitions
Create value for customers with innovative solutions

CUSTOMERS TRENDS

“I want to live in a healthy environment and take care of the planet”

“I want to create unique spaces that enhance experience”

“I want the floor as a service”

BE THE PREFERRED PARTNER

Sustainability: circular designs
- Healthy indoor
- Resources
- Environment

Design: unique spaces
- Modularity (e.g. LVT)
- Personalization (e.g. digital printing)

Innovation: interactive services
- e-services
- Co-creation (e.g. designer on demand)
- Connected floor (e.g. FloorInMotion)
Four strategic pillars

- Deliver outstanding customer experience
- Lead in design, sustainability & innovation
- Excel in sales & operations
- Create additional value with acquisitions
Best-in-class in sales and operations

Manufacturing excellence
- Continuous improvement in safety & environment, quality, customer service, costs through WCM deployment
- Deliver minimum 2% of COGS savings per annum

Supply chain excellence
- Best-in-class delivery service
- Real-time information to customer regarding order deliveries
- On-time in-full: > 95%

Sales force excellence
- Deploy new CRM and sales force excellence program
- Develop our sales talents
Four strategic pillars

- Deliver outstanding customer experience
- Lead in design, sustainability & innovation
- Excel in sales & operations
- Create additional value with acquisitions
Successful track record: 20 acquisitions in 8 years

Portfolio extension

> Leading commercial carpet manufacturer in Europe
> Specialist in hybrid artificial turf for sports surfaces

Geographic expansion

> Strengthen our commercial network and extend our industrial presence (vinyl and carpet plants) in China

Industry consolidation

> Reinforce our presence in tracks in North America
> Enhance leadership in high performance vinyl flooring for commercial application in Central Europe (Poland)
Tailor-made and smooth integration process

~ 3 months
- Safety
- Integration of financial teams and reporting

~ 6 months
- Cost management
  - Quick savings on purchasing and some SG&A costs

~ 1 year
- World Class Manufacturing deployment
  - Lean manufacturing
  - Productivity gains
- Working capital improvement

~ 2/3 years
- Marketing and sales integration
- Global SAP integration

Cultural fit & shared values
Ongoing priorities and criteria

Portfolio extension
- Increase leadership as solution provider
- Sales synergies
- Focus on categories with growth potential

Geographic expansion
- Increase presence in emerging markets with significant growth potential

Industry consolidation
- Extract cost synergies to increase profitability

Create additional value with acquisitions

~€500m of additional sales by 2020
GROUP STRATEGY

2017-2020
financial objectives
## 2017-2020 financial objectives

Unless transforming acquisition

<table>
<thead>
<tr>
<th></th>
<th>2020 net sales ~€3.5bn⁽¹⁾</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Revenue growth</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Profitability &amp; return</strong></td>
<td>&gt; Adjusted EBITDA margin &gt; 12%</td>
</tr>
<tr>
<td></td>
<td>&gt; ROIC &gt; 9%</td>
</tr>
<tr>
<td><strong>Acquisitions strategy</strong></td>
<td>&gt; Additional sales by 2020 of ~€500m</td>
</tr>
<tr>
<td><strong>Leverage</strong></td>
<td>&gt; Net debt / adjusted EBITDA &lt; 2.5x</td>
</tr>
<tr>
<td><strong>Dividend</strong></td>
<td>&gt; At least €0.60 per share</td>
</tr>
</tbody>
</table>

⁽¹⁾ Including acquisitions; organic growth outperforming estimated market growth.
International and entrepreneurial teams

Operational leaders

Remco Teulings
President EMEA

Glen Morrison
President North America

Slavoljub Martinovic
President Eastern Europe

Eric Daliere
President Sports

Executive Management Committee

Michel Giannuzzi
CEO & Chairman of the Management Board

Functional leaders

Anne-Christine Ayed
Research, Innovation & Environment

Fabrice Barthélemy
CFO
Member of the Management Board

Wendy Kool-Foulon
General Counsel

Vincent Lecerf
Human Resources
Member of the Management Board

Antoine Prevost
Operations

> Decentralized and aligned organization
> Empowered and accountable teams
> Lean and agile organization
> Compensation aligned with financial targets
> Customer-driven culture
EMEA

Remco TEULINGS
President Tarkett EMEA
EMEA - Business snapshot

KEY BRANDS

13 production sites
~4,400 employees

RECENT RESULTS 2015

<table>
<thead>
<tr>
<th>Metric</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Net sales</td>
<td>€918m</td>
</tr>
<tr>
<td>Adjusted EBITDA</td>
<td>€138m</td>
</tr>
<tr>
<td>Adjusted EBITDA margin</td>
<td>15.0%</td>
</tr>
</tbody>
</table>

Number of employees as of December 31, 2015.
EMEA - Market overview

MARKET HIGHLIGHTS

> EMEA: 2.8bn sqm in 2015, of which 28% addressable by Tarkett
> Europe only(1): 1.5bn sqm, of which 48% addressable by Tarkett
> Stabilizing markets with higher growth in modular solutions (especially LVT and carpet tiles)
> Significant variations in growth rates across region also driven by political situation

<table>
<thead>
<tr>
<th>Year</th>
<th>Residential construction output(2)</th>
<th>Non-residential construction output(2)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>New construction</td>
<td>Renovation</td>
</tr>
<tr>
<td>2012</td>
<td>-2.6</td>
<td>-7.1</td>
</tr>
<tr>
<td>2013</td>
<td>0.7</td>
<td>-3.6</td>
</tr>
<tr>
<td>2014</td>
<td>1.9</td>
<td>-1.2</td>
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<tr>
<td>2015</td>
<td>1.3</td>
<td>1.5</td>
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<tr>
<td>2016</td>
<td>1.4</td>
<td>1.9</td>
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<tr>
<td>2017</td>
<td>1.6</td>
<td>3.4</td>
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<tr>
<td>2018</td>
<td>1.4</td>
<td>2.3</td>
</tr>
</tbody>
</table>

2017-2020 expected market CAGR +0% to +2%

COMPETITIVE LANDSCAPE

> Reasonably consolidated market in vinyl rolls whilst highly fragmented in LVT
> Wood industry in transition and still consolidating
> Limited Asian imports for vinyl (except LVT) and carpet

Sources: Tarkett estimate (World Flooring Report - July 2016) and Euroconstruct report as of June 2016. (1) Excluding Turkey. (2) YoY % change - EC 19 Countries.
Focus on sustainability (cradle-to-cradle)

Leveraging Desso acquisition; include carpet tiles into our offer for healthcare, aged care and education segments

Tarkett Investor Day – October 27, 2016
EMEA – Continue to deliver profitable growth above market through cross-selling and innovation

**WHAT WE’VE DONE**
-加速LVT品类的增长
-通过新的营销和销售方式实现盈利能力的提升
-完成Desso的整合

**WHERE WE’RE GOING**
-开发针对新目标市场的强有力的价值主张
-加速作为解决方案合作伙伴的交叉销售
-推出新的设计和定制解决方案

**OUR GOALS**
-超过市场增长
-保持EBITDA利润率在15%以上
EMEA - Tailoring the integration of Desso and unlocking value Group-wide

**Case Study**

**SALES & MARKETING**
> Sales activities transferred to Tarkett, except 5 main countries: NL, B, FR, UK, D
> Tarkett-Desso bundling of product portfolios in two core segments: workplace (UK / LVT) and home (NL / Full range)
> Development of a dedicated offer for hospitality & leisure segment

**MANUFACTURING & PURCHASING**
> WCM deployment with main focus on safety, cost and reporting
> Technology benchmarking and exchange
> Purchasing synergies
> Transportation savings

**FINANCE AND LEGAL**
> SAP “light” implementation
> Corporate and legal entities optimization

**PEOPLE**
> Integration of Desso employees into local and divisional Tarkett teams
> Combining offices across many countries

**IMAGE:**
- Net sales CAGR (excl. Sports): 2012-2014 ~+1%, 2014-2016E ~+5%
**EMEA - Unleash the full potential of Desso**

**Next steps in Tarkett-Desso integration process 2017-2020**

<table>
<thead>
<tr>
<th>Full integration of sales organizations</th>
<th>Full ERP integration with one SAP</th>
<th>Roll-out of commercial excellence program</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enhance combined offer LVT/carpet for workplace segment</td>
<td>Leverage eco-innovation &amp; sustainable offer</td>
<td>Optimize manufacturing performance</td>
</tr>
</tbody>
</table>

Tarkett Investor Day – October 27, 2016
EMEA - Capture the fast-growing LVT category by increasing cross-selling

Integrated sales organization targeting key segments offering comprehensive product portfolio

- Tarkett
  - Vinyl Rolls, Linoleum, Non-PVC Rolls, LVT, Wood, Laminate
- DESSO
  - Carpet Tiles, Carpet Rolls

Extended modular resilient solutions continuing to grow significantly faster than the market

Launch of dedicated offers per segment

- Coordination of designs of carpet and LVT
- Development of smart sales support tools and communication strategy
- Supply chain and operations improvement
EMEA - Solutions partner to expand in attractive segments

**KEY COMMERCIAL MARKET SEGMENT**

- **High Attractiveness** for Tarkett
  - Stores & Shops
  - Hospitality & Leisure

**Low Attractiveness** for Tarkett
- Healthcare & Aged Care
- Education
- Workplace

**INVEST SIGNIFICANTLY TO GROW SHARE AND CAPTURE VALUE**

**KEEP STRONG POSITION AND LEVERAGE BRAND & ORGANIZATION FOR FURTHER GROWTH**

**KEY SUCCESS DRIVERS**

- Key account management
- One-stop shop cross-selling
- LVT position: insourcing manufacturing
- Customized services e.g. digital printing, lease and take-back program

(*) Internal estimation. Assessment of attractiveness is based on: category size and growth, Tarkett profit outlook and ability to compete.
EMEA - Solutions provider in stores & shops and hospitality & leisure

Key account management and cross-selling

Design customization
Marks & Spencer, UK

> 93 stores already installed in 2016 and 21 under construction
> Customized design and size of vinyl tiles
> Under discussion to implement protect-wall solutions and accessories

Multi-product offer
Melia Hotels, Spain

> 50 hotels renovated in 2015/2016, and 20 forecasted in 2017
> Acoustic LVT combined with accessories
> Recent introduction of Desso carpet
> Door opener to other hotel chains such as NH, AC, Holiday Inn and B&B
What’s ahead for EMEA

MARKET DYNAMICS

> Modest market growth
> Further concentration of the market
> Modularity
> Attractiveness of “new-for-Tarkett” segments

EMEA PRIORITIES

- Develop best-in-class customer experience
- Develop value proposition and build-up dedicated organization for new strategic segments
- Further expand LVT installed capacity
- Focus on geographic expansion and increased market penetration in selected areas
North America - Business snapshot

RECENT RESULTS 2015

- Net sales €771m
- Adjusted EBITDA €84m
- Adjusted EBITDA margin 10.9%

Number of employees as of December 31, 2015.
North America - Market overview

MARKET HIGHLIGHTS

> Market 2012-2015 CAGR of +3.5%
> 1.5bn sqm demand in 2015, of which 38% addressable by Tarkett
> Market weighted towards carpet (c. 51% of demand)

US Residential - Housing Starts(1)

US Architecture Billing Index (ABI)

COMPETITIVE LANDSCAPE

> Trend in North America to offer a broader range of product
> Increased trend in on-shoring capacity in LVT
> Expect market to continue to consolidate

Sources: Tarkett estimate (World Flooring Report - July 2016), US Census Bureau and AIA organization. (1) Seasonally adjusted annual rate (in thousands).
North America – Tarkett is a strong challenger

TARKETT POSITIONING

- 80% commercial / 20% residential
- Strong foothold in vinyl, rubber, commercial carpet and accessories
- 2 routes to market: direct and through distributors (wholesalers)

RUBBER & ACCESSORIES

- Comprehensive accessory line
- Coordinated designs with other Tarkett products

COMMERCIAL CARPET & LVT

- Combined carpet and LVT offers
- Continued acceleration of innovation

COMMERCIAL & RESIDENTIAL VINYL

- Comprehensive product range with enhanced designs
- Asthma & allergy friendly

Vinyl

No. 1

No. 3

No. 4
North America - Well positioned with strong foundation of businesses, products, brands and talents

WHAT WE’VE DONE
> Consolidated our manufacturing footprint
> Leveraged our regional and global strengths

WHERE WE’RE GOING
> Continue trend of improved productivity and operational performance
> Accelerate our innovation in products and customer experience

OUR GOALS
> Drive growth above underlying market
> Continue to enhance EBITDA margins toward 15%
North America - Consolidated manufacturing footprint

Major restructuring in VCT

Case Study

Strategic consolidation of VCT production from Houston, Texas to Florence, Alabama to realize cost, efficiency and productivity benefits

Pains of transition remedied over past 12 months

Seeing sustained improvement in quality, delivery and reliability that are resulting in significant increase in volumes year over year
North America - Pursue improved productivity and operational performance trend

WORLD CLASS MANUFACTURING (WCM) a sustainable source of competitive advantage

> Enhanced importance on WCM activities
> Reenergized WCM through talent and process to facilitate our ability to deliver:
  • Safety
  • Increased productivity
  • Enhanced quality
  • Improved service and lead times

KEY ACTIONS

> Implemented WCM principles
> Upscaled teams
> Optimized product/line combinations

Resulting in improved results within 6 months:
> Lead time reduction from 5 to 2 weeks
> 8% improvement in plant output
> Best-in-class delivery reliability (OTIF > 95%)
> Significant increase in demand

WCM implementation in Chagrin Falls, OHIO

Case Study
North America - We are leveraging our global strength

Firmly positioning Tarkett as the brand offering the “ultimate flooring experience”

- Link “Tarkett” to experience, innovation, sustainability
- Leverage strategic brands:
  - Johnsonite
  - Tandus Centiva
  - Tarkett

Our ultimate vision: the Tarkett brand name is synonymous with an outstanding experience and unparalleled innovation
North America - Building a culture of innovation: product launches won 11 awards at NeoCon

<table>
<thead>
<tr>
<th>EXPLORE THE UNARTICULATED NEEDS OF THE MARKET</th>
<th>COLLABORATIVE EFFORTS ACROSS ORGANIZATION</th>
<th>NEOCON SUCCESSES</th>
</tr>
</thead>
<tbody>
<tr>
<td>MESTO CONFIGURATIONS</td>
<td>OPEN ARCHIVE COLLECTION: GEOKNIT</td>
<td>OPEN ARCHIVE COLLECTION: CACHE TWEED</td>
</tr>
<tr>
<td>JHANE BARNES – VELOCITY &amp; LIGHTSPEED</td>
<td>METALEDGE TRIM</td>
<td>COLLECTIONS INFINIES – RIOT</td>
</tr>
</tbody>
</table>

Tarkett Investor Day – October 27, 2016
North America - Exploring the unarticulated needs: digital printing with Collections Infinies™

First Luxury Vinyl Tile (LVT) to use state-of-the-art digital printing technology along with a unique online co-creation tool

Collections Infinies won 2016 Best of NeoCon Gold: Hard Surface Flooring

More than a new product offering – Collections Infinies™ from Tarkett offers architects, designers and their clients a unique design experience and end-result
Based on direct architects & designers customer feedback to address the pain point: “access to after hours customer support”

Designer on Demand on-line service

Technology enables live chat and desktop sharing to let our team of designers help customers with their design needs - after hours, when designers need it most.
What’s ahead for North America

MARKET DYNAMICS

> Expected steady market growth from +2% to +4% per annum to 2020
> Continued market consolidation
> Significant growth and on-shoring of LVT

NORTH AMERICA PRIORITIES

- Develop best-in-class customer experience
- Continued growth above market through introduction of innovative solutions and services
- Further expand LVT installed capacity
- Maintain momentum in driving further productivity gains
- Enhance EBITDA margin toward 15%
CIS COUNTRIES

Slavoljub MARTINOVIC
President Tarkett Eastern Europe
CIS countries - Business snapshot

4 production sites in CIS & Balkans

~3,300 employees

Number of employees as of December 31, 2015.
CIS countries - Market overview

MARKET HIGHLIGHTS

> More than 500m sqm demand in 2015(1), of which 60% addressable by Tarkett
  • Vinyl and linoleum flooring represents c. 32% of demand (vs c. 8% globally)
  • Vinyl is the most used flooring solution in the region, mainly in the residential market

> Significant growth potential in the residential market across all products, driven by substantial need for renovation
  • Refurbishment needs of 2bn sqm of flooring in Russia (Rosstat)
  • Strong growth potential of the commercial market, starting from a modest size

COMPETITIVE LANDSCAPE

> In the vinyl and wood segments few competitors produce locally and have local logistic platforms
> The laminate segment is dominated by entry and low-end products, produced locally
> Local presence is a key advantage

Russia - Recovery expected to start in 2017

GDP GROWTH %

REAL MONTHLY WAGES

PRIVATE CONSUMPTION INDEX

CONSUMER CONFIDENCE INDEX

Sources: IMF GDP in constant prices as of October 2016, Datastream, Rosstat and Thomson Reuters.
Tarkett is the most recognized brand in the CIS countries

TARKETT POSITIONING

> 80% residential (average bill for home owners 150 – 200 €) / 20% commercial
> Unique service to clients from 11 distribution centers
> Largest sales force organization in all countries
> Presence in rugs and carpets (in residential and commercial segments)

VINYL
> Largest worldwide vinyl production unit located in Russia
> Strong brand awareness leading to strong category share

WOOD
> Strong player in category
> Substantial category growth potential

LAMINATE
> Strong player in high & upper segments
> Local production in Russia
CIS countries: Tarkett activated all levers to cope with the economic recession

**Case Study**

**RUSSIA GDP GROWTH %**

- 2011: 2.6
- 2005: 6.4
- 2006: 8.2
- 2007: 8.5
- 2008: 5.2
- 2009: -7.8
- 2010: 4.5
- 2011: 4.0
- 2012: 3.5
- 2013: 1.3
- 2014: 0.7
- 2015: -3.7
- 2016E: -0.8

**RUB DEVALUATION (inverted scale)**

- 31-Dec-13: 0%
- 30-Jun-14: 10%
- 31-Dec-14: 20%
- 30-Jun-15: 30%
- 31-Dec-15: 40%
- 30-Jun-16: 50%
- 21-Oct-16: 60%

**Cost optimization**
- Cost reduction > 3% p.a
- Headcount reduction (> 500 employees over two years)
- Temporary lay-offs
- Strictly controlled wage increases
- Reduction of legal entities in Serbia and Ukraine (merger)

**Mitigate Ruble volatility**
- Selling prices increased to offset devaluation
- Development of local raw material sources

**Support our customers**
- Reinforce product offering in low and entry segments
- Provide value-added services to customers (traditional retail and DIY)
Tarkett has a strong presence in all distribution channels thanks to a multi-brand and differentiated offer strategy.

**ROUTE TO MARKET FOR VINYL CATEGORY**(1)

<table>
<thead>
<tr>
<th></th>
<th>2015</th>
<th>2020E</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Domestic DIY</strong></td>
<td>9%</td>
<td>10%</td>
</tr>
<tr>
<td><strong>International DIY</strong></td>
<td>8%</td>
<td>16%</td>
</tr>
<tr>
<td><strong>Independent retail &amp; others</strong></td>
<td>83%</td>
<td>74%</td>
</tr>
</tbody>
</table>

**EVOLUTION OF DIY STORES**

<table>
<thead>
<tr>
<th></th>
<th>2015</th>
<th>2020E</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Domestic DIY</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>International DIY</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

(1) In volume (Tarkett estimate).

International DIY in Russia expected to grow fast from a low base.
Maintain strong presence in independent retail thanks to specific program

Tarkett Points

HOW DO WE DO THIS?

> Program is voluntary: independent retail decide whether they participate or not
> Special rebate system and promotions for independent retail points
> Renewal of evaluation criteria to drive performance improvement for target KPIs
> Special merchandising

BENEFIT FOR TARKETT

> Maintain Tarkett volume, share and increase number of categories
> Closer relationships with independent retail points
> In Russia, number of participants to be increased from 600 to 1,500 by 2020

BENEFIT FOR RETAILERS

> Additional earnings which help them be competitive, considering significant international DIY growth
Russia: Investment in a new parquet production line in Mytischy (near Moscow)

GOAL

> Increase volume and profitability in Wood business in Russia

STRATEGY

> Produce Wood in our existing laminate plant of Mytischy
  • Improve customer service
  • Direct contract with all International DIY’s
  • Focus on Russian raw material resources
  • Reduction of freight and direct cost

> Investment amounts to ~ €15m in 2017
What’s ahead for CIS countries

MARKET DYNAMICS

> Huge flooring refurbishment needs of 2bn sqm for Russia only, with high proportion of home-owners

> Growth of laminate and modular products categories

> Main macroeconomic indicators pointing to a stabilization for 2017 and gradual recovery in the coming years

> Growing environmental awareness

CIS COUNTRIES PRIORITIES

☑ Further protect our relationship with independent retail points

☑ Direct contract with growing international DIY

☑ Continue to invest in business development (local wood production)

☑ Further increase local raw materials sourcing to reduce costs
APAC & LATIN AMERICA

Michel GIANNUZZI
CEO
**Tarkett Asia Pacific - New opportunities**

**KEY HIGHLIGHTS**

**CHINA**
- Positioned on value-added niche markets in commercial vinyl and commercial carpet
- Recent investment in vinyl capacity expansion near Beijing
- Growing need for healthcare and aged care facilities in Asia

**AUSTRALIA**
- Leadership position in vinyl flooring for the residential segment
- Leverage Tarkett distribution network to integrate Tandus and Desso carpet offer

**KEY BRANDS**
- 2 production sites in China
- Headquarters in Shanghai
- ~370 employees

**Number of employees as of December 31, 2015.**
Tarkett Latin America - Niche leader

**KEY HIGHLIGHTS**

- **Leader in vinyl category in Brazil** (profitable and attractive niche business)
- **Strong LVT growth**
- **Strong manufacturing presence in Brazil** (sole local producer in vinyl flooring, incl. LVT); local presence limits currency risk and import duties
- **Leverage Tarkett distribution network** to integrate Tandus and Desso carpet offers

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**Number of employees as of December 31, 2015.**
Tarkett Sports - Business snapshot

12 operational hubs
>15,000 fields installed worldwide
~1,000 employees

RECENT RESULTS 2015

<table>
<thead>
<tr>
<th></th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Net sales</td>
<td>€439m</td>
</tr>
<tr>
<td>Adjusted EBITDA</td>
<td>€41m</td>
</tr>
<tr>
<td>Adjusted EBITDA margin</td>
<td>9.4%</td>
</tr>
</tbody>
</table>

Number of employees as of December 31, 2015.

Tarkett Investor Day – October 27, 2016
Tarkett Sports - Sports surface market

Artificial Turf - Sports

> Market estimated to be over 100M sqm globally
> Customers range from professional sports clubs to primary schools and small municipalities
> North America and Europe represent ~45% of global demand
> Between 2009 and 2015, European volumes shrank by more than 10% whereas North America grew by 15%
> Expect volumes in North America and Europe to grow by more than 5%, driven by replacement cycle

Artificial Turf - Landscape

> Market estimated to be 50M sqm globally, 60% in North America and Europe
> Demand growing rapidly > 10% p.a. between 2011 and 2015
> Strong presence of Chinese producers

Hybrid Turf - Turf reinforcement and Lay & Play

> Reinforcement segments > 400K sqm in 2016, growing > +20% p.a. since 2011
> Lay & Play segment also ~400K sqm and growing attractively
> New entrants in both segments

Tracks North America

> Track market in North America estimated at 3M square yards (2016)
> Since 2013, installed track volumes have grown by +9% p.a.
> Expect market growth to slow to ~3% p.a. in coming years
Tarkett Sports - A market leader with a differentiated offer

TARKETT POSITIONING

> Artificial turf represents the majority of the division’s revenue, but tracks is an important contributor of sales and profit
> Tarkett Sports’ positioning is at the mid and higher-end of the market

ARTIFICIAL TURF

- Superior fiber technologies
- Patented / proprietary infills
- Unique coatings and backings
- Integrated underlayments

HYBRID TURF

- Established and trusted player and technology
- Unmatched references and high profile successes
- Deep agronomy experience
- Complete product offer - Grassmaster & Playmaster

RUNNING TRACKS

- Exceptional longevity and traction: EPDM mixed throughout wear layer to ensure superior traction throughout track’s life
- Seamless and weather stable: Full pour PU system, highly resistant to cracking
- Unique post-tension ovals
- Ability to tune tracks to customer’s preferences and meet IAAF specifications
- Full turn-key capabilities
Tarkett Sports’ turnaround completed

5 stages of turnaround
Case Study

KEY DRIVERS

- Upgraded talent and systems
  - Senior leadership
  - ERP / CRM
- Reduced fixed costs / improved operating leverage
  - Operations
  - Discretionary spend
- Improved variable costs
  - Yields / Throughputs
  - Inputs
  - Install efficiency
- Captured margin through vertical integration
  - Fiber, Coating, Logo, Infill
- Regained share through innovation and cost competitiveness
- Executed accretive acquisitions: Renner, CalTrack, Desso Sports
- Expanded product offerings

ADJUSTED EBITDA MARGIN IMPROVEMENT 2011 TO 2016

-4.8% 3.9% 5.2% 8.8% 9.4% 10.1%

5 stages of turnaround:
- Stage 1: Restructuring 2009/2010
- Stage 2: Stabilisation 2010/2011
- Stage 3: Gradual improvement 2011/2012
- Stage 4: Rapid improvement 2013/2014
- Stage 5: Sustain the gains 2015/2016

~4–5 years
Tarkett Sports - A strong innovation pipeline

Artificial turf designed to keep athletes cool

**Customer Need**

- Temperatures on artificial turf sports fields are much higher than natural grass fields
- Common solution is to water fields before play: drawbacks are that it is a temporary fix, requires irrigation and manpower, defeats water usage benefit of artificial turf

**FieldTurf Solution - CoolPlay**

- Offer a composite infill based on natural materials that dramatically reduces surface temperatures
- Key benefits:
  - -20°C surface temperature reduction
  - Non-static, won’t float
  - Modest upcharge for the customer
  - Leverages FieldTurf’s existing infill patents
Tarkett Sports - A strong innovation pipeline

Banked Hydraulic Track

Customer Need

- Indoor banked hydraulic track to allow athletes of all levels to compete safely
- Upgrade on the existing technology

Beynon Solution - Rise n’ Run Track

- Sought to understand customers wants
- Delivered superior features
  - More stable and robust frame
  - Better hydraulics for smoother, more accurate positioning
  - Simple to use, touch screen controls
  - Free standing frame

Impact

- Have been awarded 3 of 5 hydraulic tracks projects since entering the category
- Currently being built: Virginia Military Institute, University of Michigan, Liberty University
- Promising pipeline
What’s ahead for Tarkett Sports

MARKET DYNAMICS

> Growth in core sports turf markets driven by replacement wave
> Continued expansion of landscape artificial turf market
> Increased adoption of hybrid turf
> Shift away from SBR towards alternative infills globally
> Consolidation and reshuffling of competitive environment

TARKETT SPORTS PRIORITIES

- Successfully commercialize innovation pipeline in turf & tracks
- Benefit from growth of alternative infills
- Accelerate growth and extend leadership in hybrid turf
- ‘Win’ in replacement market
- Capture operating leverage and scale
- Continue international expansion
INNOVATION

Anne-Christine AYED
EVP Research, Innovation and Environment
Innovation strategy: driver for organic growth

CUSTOMERS NEEDS

“I want to live in a healthy environment and take care of the planet”

“I want to create unique spaces that enhance experience”

“I want the floor as a service”

FROM PRODUCT-DRIVEN INNOVATION... • Eco innovation

...TO INNOVATIVE SOLUTIONS & SERVICES

Circular designs

Modularity & design

Unique spaces

Technology & performance

Connected & interactive spaces
Our sustainability strategy targets healthy environment and circular economy, and drives eco-innovation

Sustainability: circular designs

Tarkett sustainability commitment

<table>
<thead>
<tr>
<th>Initiatives</th>
<th>2020 objectives</th>
</tr>
</thead>
<tbody>
<tr>
<td>Æ Choose good materials in terms of potential risk towards people and the environment</td>
<td>&gt; 100% of materials used in our products are continuously assessed by a third party</td>
</tr>
<tr>
<td>Æ Increase the share of abundant, renewable and recycled materials</td>
<td>&gt; 75% of the materials at the source of our supply chain do not contribute to resource scarcity (incl. recycled materials)</td>
</tr>
<tr>
<td>Æ Reduce usage of fresh and potable water</td>
<td>&gt; 100% of our manufacturing sites have implemented closed-loop water circuits</td>
</tr>
<tr>
<td>Æ Decrease energy consumption and greenhouse gas emissions</td>
<td>&gt; 20% reduction of GHG emissions against a 2010 baseline (1.01 KgCO2/m²)</td>
</tr>
<tr>
<td>Æ Design solutions ensuring indoor air quality, health and well-being</td>
<td>&gt; 100% of flooring products are phthalate-free and have low emissions</td>
</tr>
<tr>
<td>Æ Design solutions that are eco-effective to install and maintain</td>
<td>&gt; 100% of our flooring solutions offer maintenance and installation procedures following Cradle to Cradle principles</td>
</tr>
<tr>
<td>Æ Ensure that all manufacturing waste enter into a biological or technical cycle</td>
<td>&gt; Zero industrial waste going to landfill</td>
</tr>
<tr>
<td>Æ Develop take-back programs for our flooring solutions, allowing to close the loop</td>
<td>&gt; Double volume of collected post-installation or post-consumer flooring and sports surface products, compared to 2010 (18,900 tonnes)</td>
</tr>
</tbody>
</table>

Anticipation
Leadership
Differentiation
Savings
Designing solutions with healthy materials that contribute to well-being and quality of life

Sustainability: circular designs

WHAT WE’VE DONE

> Indoor Air quality: 10 to 100 times below the strictest standards since 2010
> Healthy materials: phthalate-free plasticizers technology, now requested by US DIY
> Asthma and allergies friendly flooring systems

FUTURE INNOVATIONS

> New products based on recycled materials
> Easy: to-install, to-uninstall and to-disassembly flooring for cost-efficient sorting
> Healthy and eco-friendly maintenance and cleaning systems (co-development with cleaning manufacturer)
Develop circular economy services based on healthy recycled materials

Sustainability: circular designs

RECYCLED RESOURCES

Reduce consumption of virgin raw materials
- Vinyl recycled resources cheaper than virgin raw materials
- Up to 50% of recycled content (Europe) in LVT backing

Use waste from other industries as resources
- Waste avoidance using safety film from windshield in carpet backing

INNOVATIVE SERVICES

Set up reliable sources of high-quality secondary resources

Develop logistic partnership with Veolia
- Double collecting centers (France), to be extended in Germany
- x5 collected volumes by 2020 (vs. 2015) in Europe
- Co-research on new separation and recycling technologies

Anticipate virgin materials scarcity and future regulations

Offer value-added services to customers for waste management
Deliver unique experience thanks to digital printing technology

Design: unique spaces

INDUSTRIAL & SUPPLY CHAIN

Patented breakthrough process to digitally print specific designs (vs. traditional offset cylinder process)

Production and supply chain flexibility
> Quick and easy creation and change of design printing (vs. cylinder engraving and change, and color mix)
> Potential time and cost savings (low minimum order size for unique design, reduced stock level and obsolescence)

INNOVATIVE MATERIALS

> Personalized designs: from exclusive pattern (i.e. logo design) to mass-customized design
> No-repetition patterns: unique and natural effect
> High-quality image and multiple colors
> Unlimited creativity freedom for architects and designers

First to industrialize mass-digital printing on vinyl in North America and Europe

Leverage state-of-the-art technology on various floorings

Offer unique customization and co-creation services

Increase flexibility throughout the value chain
Offer healthcare and aged care services thanks to connected living spaces

Connected and interactive spaces

CONNECTED FLOORING SOLUTIONS

Real-time alarm and information services for care givers

First flooring manufacturer to offer combined connected floor and associated services

CUSTOMER EXPERIENCE

> Reassure the patient and his family
> Facilitate the daily work of care givers
> Provide value-added information to the medical teams on patient activity
> Offer differentiated service for aged care institutions
> 550 rooms by end of 2016

Extend to senior and nursing homes

Accelerate worldwide development

Explore new applications based on connected spaces
Q3 2016 and 2016 FY estimate

Strong profitability improvement in a soft demand environment

> Q3 2016

- Net sales: €794m, -2.1% on an organic basis vs. Q3 2015\(^{(1)}\), -0.2% including price increases in the CIS
  - Flat organic sales in EMEA, North America and Sports segments
  - CIS still on a negative volume trend – in line with our expectations
- Further increase of Adjusted EBITDA margin to 15.0% from 14.0% in Q3 2015
  - Margin uplift in the CIS thanks to selling prices and cost management

> 2016 FY estimate

- Sales: €2,700 - €2,750m
- Adjusted EBITDA: €315m - €330m
- Adjusted EBITDA margin: 11.5% - 12.2%

\(^{(1)}\) Organic growth: At same perimeter and exchange rates (NB: In the CIS, price increases implemented to offset currency fluctuations are not included in the organic growth. Organic growth in the CIS therefore reflects volume and mix variances only).
### 2017-2020 financial objectives

Unless transforming acquisition

<table>
<thead>
<tr>
<th>Category</th>
<th>Objective</th>
</tr>
</thead>
<tbody>
<tr>
<td>Revenue growth</td>
<td>&gt; 2020 net sales ~€3.5bn⁽¹⁾</td>
</tr>
<tr>
<td>Profitability &amp; return</td>
<td>&gt; Adjusted EBITDA margin &gt; 12%</td>
</tr>
<tr>
<td></td>
<td>&gt; ROIC &gt; 9%</td>
</tr>
<tr>
<td>Acquisitions strategy</td>
<td>&gt; Additional sales by 2020 of ~€500m</td>
</tr>
<tr>
<td>Leverage</td>
<td>&gt; Net debt / adjusted EBITDA &lt; 2.5x</td>
</tr>
<tr>
<td>Dividend</td>
<td>&gt; At least €0.60 per share</td>
</tr>
</tbody>
</table>

⁽¹⁾ Including acquisitions; organic growth outperforming estimated market growth.
All segments to contribute to 2020 financial objectives

Based on relatively stable raw material prices

<table>
<thead>
<tr>
<th>SEGMENT</th>
<th>CAGR(^{(1)})</th>
<th>ADJ. EBITDA MARGIN OBJECTIVE</th>
<th>MAIN FOCUS</th>
</tr>
</thead>
<tbody>
<tr>
<td>EMEA</td>
<td>+0% / +2%</td>
<td>Remain above 15%</td>
<td>Organic growth</td>
</tr>
<tr>
<td>North America</td>
<td>+2% / +4%</td>
<td>Reach 15%</td>
<td>Cost efficiency</td>
</tr>
<tr>
<td>CIS, APAC &amp; LATAM</td>
<td>+0% / +3%</td>
<td>Back to 15%</td>
<td>Progressive economic recovery in CIS</td>
</tr>
<tr>
<td>Sports</td>
<td>+3% / +7%</td>
<td>Reach 12%</td>
<td>Market growth &amp; cost efficiency</td>
</tr>
<tr>
<td>Central costs</td>
<td></td>
<td>circa -2% of sales</td>
<td>Investment in R&amp;D &amp; customer experience</td>
</tr>
</tbody>
</table>

\(^{(1)}\) CAGR based on GDP growth in the regions where we are present.

\(>12\%\) adjusted EBITDA margin objective
Productivity: structural and ongoing savings thanks to World Class Manufacturing

<table>
<thead>
<tr>
<th>Year</th>
<th>Productivity as a % of COGS</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>2.6%</td>
</tr>
<tr>
<td>2012</td>
<td>2.6%</td>
</tr>
<tr>
<td>2013</td>
<td>2.3%</td>
</tr>
<tr>
<td>2014</td>
<td>2.4%</td>
</tr>
<tr>
<td>2015</td>
<td>2.3%</td>
</tr>
<tr>
<td>2016</td>
<td>2.3%</td>
</tr>
</tbody>
</table>

**Objective:** €40m / year minimum

**Target > 2%**
Well-invested and managed industrial assets

INVESTMENTS

Ongoing capex (€m)

<table>
<thead>
<tr>
<th>Year</th>
<th>Ongoing Capex (€m)</th>
<th>Capex as % of Net Sales</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>77</td>
<td>3.7%</td>
</tr>
<tr>
<td>2012</td>
<td>84</td>
<td>3.6%</td>
</tr>
<tr>
<td>2013</td>
<td>88</td>
<td>3.5%</td>
</tr>
<tr>
<td>2014</td>
<td>78</td>
<td>3.2%</td>
</tr>
<tr>
<td>2015</td>
<td>79</td>
<td>2.9%</td>
</tr>
<tr>
<td>2016E</td>
<td>90</td>
<td>3.3%</td>
</tr>
</tbody>
</table>

Objective: ~3.5% of sales
Focus on Return On Invested Capital (ROIC)

Adjusted EBIT \times (1 - \text{Normative tax rate}^{(1)})

\[
\text{ROIC} = \frac{\text{NOPAT}}{\text{Capital Employed}}
\]

- Goodwill + Tangible & intangible Assets + Working Capital

Objective: ROIC > 9.0%, higher than the WACC

(1) 35.0%.
Solid balance sheet and extended debt maturity

**NET FINANCIAL DEBT AND LEVERAGE RATIO**

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Net debt in €m</td>
<td>595</td>
<td>671</td>
<td>482</td>
<td>568</td>
</tr>
<tr>
<td>Net debt/Adjusted EBITDA(1)</td>
<td>2.0x</td>
<td>2.3x</td>
<td>1.7x</td>
<td>1.8x</td>
</tr>
</tbody>
</table>

Objective: < 2.5x

**MATURITY OF AVAILABLE CREDIT LINES**

<table>
<thead>
<tr>
<th>in €m</th>
</tr>
</thead>
<tbody>
<tr>
<td>151</td>
</tr>
<tr>
<td>4</td>
</tr>
<tr>
<td>153</td>
</tr>
<tr>
<td>1</td>
</tr>
<tr>
<td>651</td>
</tr>
</tbody>
</table>

RCF

<table>
<thead>
<tr>
<th>€300m Schuldschein</th>
</tr>
</thead>
<tbody>
<tr>
<td>174</td>
</tr>
<tr>
<td>0</td>
</tr>
<tr>
<td>126</td>
</tr>
</tbody>
</table>

Objective: < 2.5x

Diversified financing

---

(1) Adjusted EBITDA: Adjustments include expenses related to restructuring, acquisitions and certain other non-recurring items, and adjusted EBITDA of Desso in 2014.
M&A: financial discipline and significant firepower

**AQUISITION CRITERIA**

- After 2 years: adjusted EBITDA margin > 12.0%
- After 3 years: ROIC > 9%

**SIGNIFICANT FINANCIAL HEADROOM**

For illustration purposes only, based on EV multiples of 7.0x to 9.0x EBITDA

> A €500m acquisition (Enterprise Value) would increase the leverage to less than 2.5x adjusted EBITDA (vs. end of Dec. 2016 level)
## Dividend policy

Unless transforming acquisition

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Dividend per share</td>
<td>€0.62</td>
<td>€0.38</td>
<td>€0.52</td>
<td>€0.60</td>
<td>&gt;€0.60</td>
</tr>
<tr>
<td>% of Net profit</td>
<td>40%</td>
<td>40%</td>
<td>40%</td>
<td>30-50%</td>
<td>30-50%</td>
</tr>
</tbody>
</table>
CONCLUSION

Michel GIANNUZZI
CEO
Tarkett strategy and financial objectives

**STRATEGY**

- Deliver outstanding customer experience
- Lead in design, innovation & sustainability
- Excel in sales and operations
- Create additional value with acquisitions

**2017-2020 FINANCIAL OBJECTIVES**

<table>
<thead>
<tr>
<th>Objective</th>
<th>Target</th>
</tr>
</thead>
<tbody>
<tr>
<td>Revenue growth</td>
<td>2020 net sales ~€3.5bn&lt;sup&gt;(1)&lt;/sup&gt;</td>
</tr>
<tr>
<td>Profitability &amp; return</td>
<td>Adjusted EBITDA margin &gt; 12%</td>
</tr>
<tr>
<td></td>
<td>ROIC &gt; 9%</td>
</tr>
<tr>
<td>Acquisitions strategy</td>
<td>Additional sales by 2020 of ~€500m</td>
</tr>
<tr>
<td>Leverage</td>
<td>Net debt / adjusted EBITDA &lt; 2.5x</td>
</tr>
<tr>
<td>Dividend</td>
<td>At least €0.60 per share</td>
</tr>
</tbody>
</table>

<sup>(1)</sup> Including acquisitions; organic growth outperforming estimated market growth.
Tarkett offers one of the broadest product ranges to all end-markets and the most diversified geographic exposure with 80% in renovation.

Tarkett has maintained its leadership position in CIS countries during the downturn.

Tarkett generates strong free cash flows and has a good track record in integrating acquisitions.

Tarkett has entrepreneurial and agile teams focusing on profitable growth.

RESILIENCE AND OPPORTUNITIES

READY TO BENEFIT FROM CIS RECOVERY

VALUE-CREATIVE ACQUISITIONS

BALANCED GROWTH OF REVENUE AND PROFIT
EMEA Q3 2016

NET SALES EVOLUTION

in €m

Q3 2015 230.9
Q3 2016 222.9

-3.5% reported

Q3 2016
Net sales organic growth\(^{(1)}\) +1.1%

9M 2016
Net sales organic growth\(^{(1)}\) +4.0%

REPORTED SALES

> -3.5% due to negative impact of currencies (primarily the British pound) and the reclassification of some Desso sales to other segments

> Sound growth in the Nordics, Germany and the Netherlands

> The UK suffered from the recent Brexit uncertainties

> Spain continued to be affected by the political deadlock

> France slightly negative on the back of a sluggish remodeling activity

> LVT category sales (Luxury Vinyl Tiles) continued to grow rapidly across the region
North America Q3 2016

NET SALES EVOLUTION

*in €m*

<table>
<thead>
<tr>
<th></th>
<th>Q3 2015</th>
<th>Q3 2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Net sales organic growth(1)</td>
<td>214.1</td>
<td>216.6</td>
</tr>
</tbody>
</table>

(1) Organic growth: At same perimeter and exchange rates.

REPORTED SALES

> +1.1% following the reclassification of some sales from Desso Europe

> Continues to benefit from LVT growth

> Faced a softer demand in commercial carpet mostly in the corporate office sector
NET SALES EVOLUTION

in €m

Q3 2015 164.6

Q3 2016 157.7

-4.2% reported

Q3 2016 Net sales organic growth\(^{(1)}\) -10.1%

9M 2016 Net sales organic growth\(^{(1)}\) -8.7%

CIS countries
> Decline in volume at similar rate to H1’s
> Economic conditions remained difficult in Russia with consumer disposable income still at a low level
> Kept reducing costs and further deployed productivity actions
‡ Profitability improved significantly versus both H1 2016 and H2 2015

APAC
> Activity remained weak, both in Australia and in China

Latin America
> Finally impacted by the depressed economic environment, in particular Brazil

---

(1) Organic growth: At same perimeter and exchange rates (NB: In the CIS, price increases implemented to offset currency fluctuations are not included in the organic growth. Organic growth in the CIS therefore reflects volume and mix variances only).
Sports Q3 2016

NET SALES EVOLUTION

in €m

Q3 2015 | Q3 2016
---|---
199.2 | 197.2

-0.9% reported

Q3 2016 Net sales organic growth(1)  
-0.9%

9M 2016 Net sales organic growth(1)  
+5.1%

(1) Organic growth: At same perimeter and exchange rates.

> Lower proportion of turn-key projects that include revenues from civil engineering

> Turf product sales kept growing

> Running tracks sales remained very dynamic
Net sales evolution in Q3 2016

NET SALES

in €m

Q3 2015 | EMEA | North America | CIS, APAC & LATAM | Sports | Sales LfL(1) | Currencies | Selling price lag effect in CIS | Q3 2016
---|---|---|---|---|---|---|---|---
808.8 | 2.6 | (1.5) | (16.6) | (1.6) | 791.8 | (2.6) | 5.0 | 794.3

(1) Organic growth: At same perimeter and exchange rates (NB: In the CIS, price increases implemented to offset currency fluctuations are not included in the organic growth. Organic growth in the CIS therefore reflects volume and mix variances only).
> Improvement in EBITDA in Q3 thanks to positive lag effect and productivity

### Adjusted EBITDA in Q3 2016

<table>
<thead>
<tr>
<th>Factor</th>
<th>Q3 2015</th>
<th>Currencies</th>
<th>Selling price lag effect in CIS</th>
<th>Volume/Mix</th>
<th>Sales pricing</th>
<th>Purchase pricing</th>
<th>Productivity</th>
<th>SG&amp;A, Wage increase &amp; Other</th>
<th>Q3 2016</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>EBITDA improvement</strong></td>
<td>113.2</td>
<td>(1.3)</td>
<td>6.6</td>
<td>(0.2)</td>
<td>3.5</td>
<td>8.9</td>
<td>119.2</td>
<td>(7.5)</td>
<td>119.2</td>
</tr>
</tbody>
</table>

(1) Adjusted EBITDA: Adjustments include expenses related to restructuring, acquisitions and certain other non-recurring items.
> Robust EBITDA over the first nine months of the year

**ADJUSTED EBITDA(1)**

<table>
<thead>
<tr>
<th></th>
<th>YTD Sep-15</th>
<th>Currencies</th>
<th>Selling price lag effect in CIS</th>
<th>Volume/Mix</th>
<th>Sales pricing</th>
<th>Purchase pricing</th>
<th>Productivity</th>
<th>SG&amp;A, Wage increase &amp; Other</th>
<th>YTD Sep-16</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>241.2</td>
<td>(6.4)</td>
<td>(6.0)</td>
<td>19.3</td>
<td>(7.1)</td>
<td>16.2</td>
<td>33.9</td>
<td>(20.6)</td>
<td>270.6</td>
</tr>
</tbody>
</table>

(1) Adjusted EBITDA: Adjustments include expenses related to restructuring, acquisitions and certain other non-recurring items.
Ruble and Russia vinyl prices evolution

Sources: Reuters and Tarkett data.
Material consumption in 2015

COGS breakdown as of December 31, 2015

- Total COGS: €2,045m
- Raw materials: 58%
- Payroll: 16%
- Transport and logistics: 10%
- Others: 16%

Material consumption detail

- Oil derivatives: 53%
- Traded goods: 22%
- Other raw materials: 25%
Shareholder composition

As of July 31, 2016

> Shareholder agreement between KKR and the Deconinck family to remain in place post-IPO for a term of 4 years (or until one party holds less than 5% of the share capital)
Tarkett Supervisory Board

> 9 Board members

4 representatives of the Deconinck family

- Didier Deconinck
  President

- Bernard-André Deconinck

- Eric La Bonnardière

3 independent members

- Gérard Buffière

- Françoise Leroy

- Guylaine Saucier

2 representatives of KKR

- Jacques Garaialde
  Vice President

- Josselin de Roquemaurel

2 observers

- Julien Deconinck
- Nicolas Deconinck

Supervisory Board Special Committees

> Audit Committee

Chaired by

- Guylaine Saucier
- Françoise Leroy
- Josselin de Roquemaurel

> Nomination & Compensation Committee

Chaired by

- Gérard Buffière
- Françoise Leroy
- Jacques Garaialde
- Bernard-André Deconinck
Detailed overview of Tarkett’s product offering

Vinyl & Linoleum: 48%
- Heterogeneous Vinyl
- Homogenous Vinyl
- Linoleum

Carpet: 21%
- Broadloom
- Modular

Wood & Laminate: 7%
- Multilayer wood floor
- Laminate

Rubber & Accessories: 7%
- Rubber Tiles/Sheets
- Stair nosing

Sports: 17%
- Track
- Artificial Turf
- Reinforced natural grass

Note: Percentages based on 2016 estimated net sales.
### Vinyl and Linoleum (1/2)

#### Heterogeneous Vinyl

<table>
<thead>
<tr>
<th>Description</th>
<th>Characteristics</th>
<th>Main segments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Floorcovering consisting of a wear layer and other compact layers which differ in composition and/or design and may contain a reinforcement.</td>
<td>Unlimited design possibilities</td>
<td>Healthcare &amp; Aged care</td>
</tr>
<tr>
<td>Heterogeneous compact floor covering: Compact flexible Vinyl floor covering with glass fibre reinforcement.</td>
<td>Durability</td>
<td>Offices</td>
</tr>
<tr>
<td>Heterogeneous acoustic floor covering: PolyVinyl chloride floor coverings with foam layer.</td>
<td>Ease of maintenance</td>
<td>Education</td>
</tr>
</tbody>
</table>

#### Heterogeneous Commercial Vinyl

- **Product:** HE modular products are all HE products coming in plank or tile formats.
- **Characteristics:**
  - Unlimited design possibilities
  - Comfort
  - Durability & convenience
- **Main segments:**
  - Offices
  - Education
  - Collective Housing
  - Indoor Sports

#### Heterogeneous Residential Vinyl

- **Product:** High end Vinyl tiles combining Vinyl resin with mineral dust filler, making them very hard and durable.
- **Characteristics:**
  - Unlimited design possibilities
  - Excellent performance
  - Durability
  - Easy installation
  - Ease of maintenance
- **Main segments:**
  - Private housing

#### LVT (Modular Heterogeneous Vinyl)

- **Product:** HE modular products are all HE products coming in plank or tile formats.
- **Characteristics:**
  - Unlimited design possibilities
  - High end Vinyl tiles combining Vinyl resin with mineral dust filler, making them very hard and durable.
  - For Professionals: Luxury Vinyl Tiles (LVT), Loose Lay Tiles (LLT)
  - For the Home: Luxury Vinyl Tiles (LVT), Self-Adhesive Products (SAP)
- **Main segments:**
  - Education
  - Healthcare & Aged care
  - Offices
  - Stores & Shops
  - Hospitality
  - Private & Collective Housing
### Vinyl and Linoleum (2/2)

<table>
<thead>
<tr>
<th>Product</th>
<th>Description</th>
<th>Characteristics</th>
<th>Main segments</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>LINOLEUM</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Plain and decorative Linoleum made with Linoleum cement, cork powder, wood powder, pine resin, calcium carbonate, pigments calendered on jute or foam backing</td>
<td>Natural product</td>
<td>Healthcare, Offices, Education, Indoor Sports</td>
</tr>
<tr>
<td></td>
<td>Jute backing coated with linseed oil</td>
<td>Durability</td>
<td>Offices, Stores &amp; Shops, Industry &amp; Transport, Healthcare &amp; Aged care, Education</td>
</tr>
<tr>
<td></td>
<td>True natural alternative to Vinyl</td>
<td>Ease of maintenance</td>
<td>Offices, Stores &amp; Shops, Industry &amp; Transport, Healthcare &amp; Aged care, Education</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Timeless design</td>
<td></td>
</tr>
<tr>
<td><strong>HOMOGENEOUS VINYL</strong></td>
<td>Homogenous Vinyl: floor covering with one or more layers of the same composition and color, patterned throughout its thickness</td>
<td>Durability</td>
<td>Offices, Stores &amp; Shops, Industry &amp; Transport, Healthcare &amp; Aged care, Education</td>
</tr>
<tr>
<td></td>
<td>VCT: Created by combining Vinyl resin with mineral dust filler, making the tiles very hard and durable</td>
<td>Strong resistance to indentation</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Vinyl, or resilient flooring, is made of PVC often reinforced with glass fiber</td>
<td>Ease of maintenance</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Offers many advantages: very affordable price, durability, ease of maintenance, acoustic properties</td>
<td>Timeless design</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Surface treatment</strong></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Homogeneous Vinyl</td>
<td>Colour pigments</td>
<td></td>
<td></td>
</tr>
<tr>
<td>VCT (modular homogeneous Vinyl)</td>
<td>Colour pigments</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## Wood and Laminate

### WOOD

- **Description**
  - Engineered wood combines a top layer of hardwood and layers of softwood
  - Cheaper than solid wood, more stable and better for the use of rapidly renewable natural resources
  - Parquet flooring
    - Top layer of hardwood with minimum thickness of 2.5 mm
    - Additional layer(s) of wood, or woodbased materials, glued together
  - Veneer flooring
    - Top layer of hardwood with thickness < 2.5 mm
    - Additional layer(s) of wood, or woodbased materials, glued together

- **Characteristics**
  - Natural product
  - Barefoot walking comfort
  - Elegance and design
  - Durability

- **Main segments**
  - Stores and shops
  - Hospitality
  - Private Housing
  - Indoor Sports

### LAMINATE

- **Description**
  - Made out of several layers of different materials pressed together under very high pressure
  - Gives the appearance of hardwood, ceramic tile or stone without using these products
  - Surface layer: one or more thin sheets of a fibrous material (usually paper), impregnated with aminoplastic, thermosetting resins (usually melamine)
  - These sheets are either pressed as such or bonded to a substrate (usually wood-based panels)
  - Product is usually finished with a backing (e.g. impregnated papers and veneers), primarily used as a balancing material

- **Characteristics**
  - Easy installation
  - Easy maintenance
  - Wide range of designs, patterns and embossings

- **Main segments**
  - Offices
  - Stores and shops
  - Hospitality
  - Private Housing
## Rubber, Accessories and Carpet

### RUBBER SHEETS, TILES AND ACCESSORIES

<table>
<thead>
<tr>
<th>Product</th>
<th>Description</th>
<th>Characteristics</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rubber Sheets/Tiles</td>
<td>Rubber sheets and tiles can blend recycled Rubber with colored Rubber chips, offering a wide variety of colour options.</td>
<td>Can be broadloom, modular or hybrid.</td>
</tr>
<tr>
<td>Stair nosing</td>
<td>Stair nosings, stair borders, tactile warning strips, wetroom drains, thresholds</td>
<td>Secular trend from broadloom towards modular.</td>
</tr>
<tr>
<td>Drain</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### CARPET

<table>
<thead>
<tr>
<th>Modular</th>
<th>Shock absorption</th>
<th>Good acoustic properties</th>
<th>Wide range of colours and patterns</th>
<th>Warm/comfortable</th>
<th>Easy installation (for Carpet tiles)</th>
<th>Contributes to an improved indoor air quality</th>
<th>Cradle to Cradle certified</th>
</tr>
</thead>
<tbody>
<tr>
<td>Broadloom</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Characteristics

- Wide range of colours, patterns and textures
- Shock absorption
- Naturally slip resistant
- Natural acoustic properties
- Low maintenance requirements
- Integrated system: floor, wall base, accessories, stairs, etc

### Main segments

- Healthcare
- Education
- Industry
- Indoor Sports
### TURF

<table>
<thead>
<tr>
<th>Product</th>
<th>Description</th>
<th>Characteristics</th>
</tr>
</thead>
<tbody>
<tr>
<td>Polyethylene fibres tufted into backing</td>
<td>Polyethylene fibres tufted into backing</td>
<td>Appearance similar to natural grass</td>
</tr>
<tr>
<td>Coating of the backing in rows</td>
<td>Coating of the backing in rows</td>
<td>Strong wear resistance</td>
</tr>
<tr>
<td>Finished Carpet ready to be installed on the pitch</td>
<td>Finished Carpet ready to be installed on the pitch</td>
<td>Durable</td>
</tr>
<tr>
<td>Patented infilling: mixture of cryogenic Rubber and sand</td>
<td>Patented infilling: mixture of cryogenic Rubber and sand</td>
<td>Excellent pile recovery</td>
</tr>
<tr>
<td>Natural grass</td>
<td>Natural grass</td>
<td>Safe and soft</td>
</tr>
</tbody>
</table>

### REINFORCED NATURAL GRASS

<table>
<thead>
<tr>
<th>Product</th>
<th>Description</th>
<th>Characteristics</th>
</tr>
</thead>
<tbody>
<tr>
<td>Polyethylene fibres tufted into backing</td>
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</tr>
<tr>
<td>Natural grass</td>
<td>Natural grass</td>
<td>Safe and soft</td>
</tr>
</tbody>
</table>

### TRACKS

<table>
<thead>
<tr>
<th>Product</th>
<th>Description</th>
<th>Characteristics</th>
</tr>
</thead>
<tbody>
<tr>
<td>Polyethylene fibres tufted into backing</td>
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<tr>
<td>Coating of the backing in rows</td>
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</tr>
<tr>
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<td>Patented infilling: mixture of cryogenic Rubber and sand</td>
<td>Safe and soft</td>
</tr>
<tr>
<td>Natural grass</td>
<td>Natural grass</td>
<td>Strong wear resistance</td>
</tr>
</tbody>
</table>

The table provides a list of characteristics for each product, including:

- Many advantages: no use of water or pesticides, savings in maintenance, better field availability, better safety for the players and customization possible
- FieldTurf is recommended by the IRB (International Rugby Board) and was awarded "Preferred Producer" by FIFA in October 2011
- Patented system of extruded monofilament fibers tufted into a backing material
- Also features a multilayer infill of sand and Rubber
- A 100% natural sport grass pitch reinforced by millions of artificial turf fibers
- Patented system of extruded monofilament fibers tufted into a backing material
- Also features a multilayer infill of sand and Rubber
- Polyurethane surface providing a long lifecycle (>25 years for certain tracks) and high safety standards
- Polyurethane bound, black Rubber mat
- Embedded or encapsulated texture, providing all weather usage
- Playing quality of perfect natural grass
- Stronger grass pitch for intensive use
- At least 3 x more playable
- Multifaceted sport infrastructure
- Faster repair than natural grass
- Long-term returns for stadiums
- Easy installation
- Shock absorption
- Acoustic properties
- Long life cycle
- Great return on energy
- Easy to resurface