

Introducing

The SAES[®] Getters Group

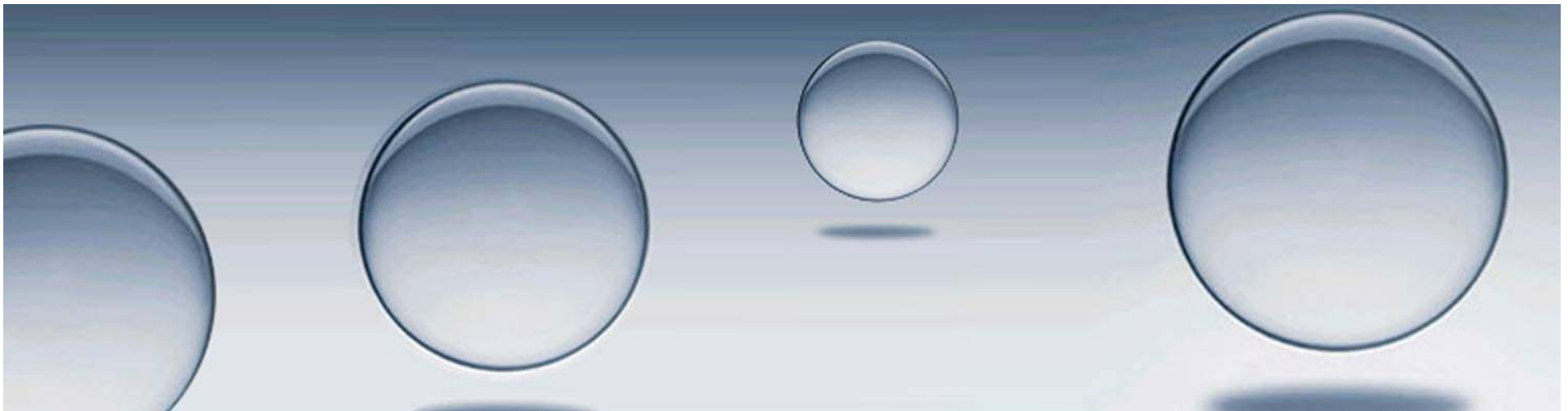
October 2008

we support your innovation

saes
getters

Core Business

The SAES[®] Getters Group is the World leader in a variety of scientific and industrial applications where stringent **vacuum** conditions or **pure metals evaporation** or **ultra-high pure gases** are required.



Core Business

For nearly 70 years, our getter solutions have been supporting **technological innovation** in:

- The information display industry
- The lamp industry
- A wide range of electronic device-based applications
- Vacuum and Ultra-high Vacuum Technology
- Vacuum thermal insulation
- Semiconductors

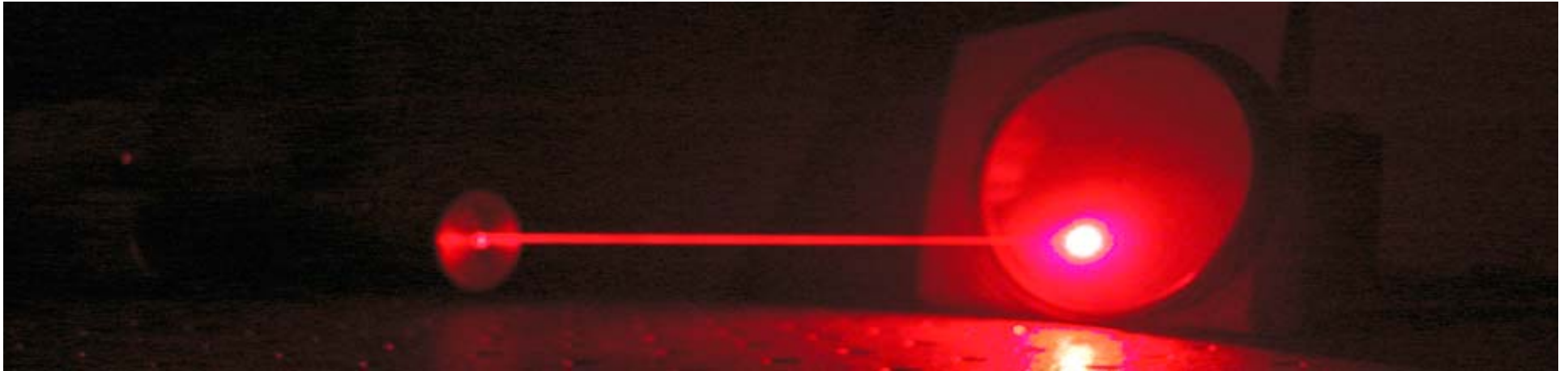
SAES Getters Vision

To be the leading global supplier of getters and advanced materials to niche markets characterized by high growth potential in the high-tech business segments.

To grow in the market of advanced materials through a balanced strategy of organic and inorganic growth.



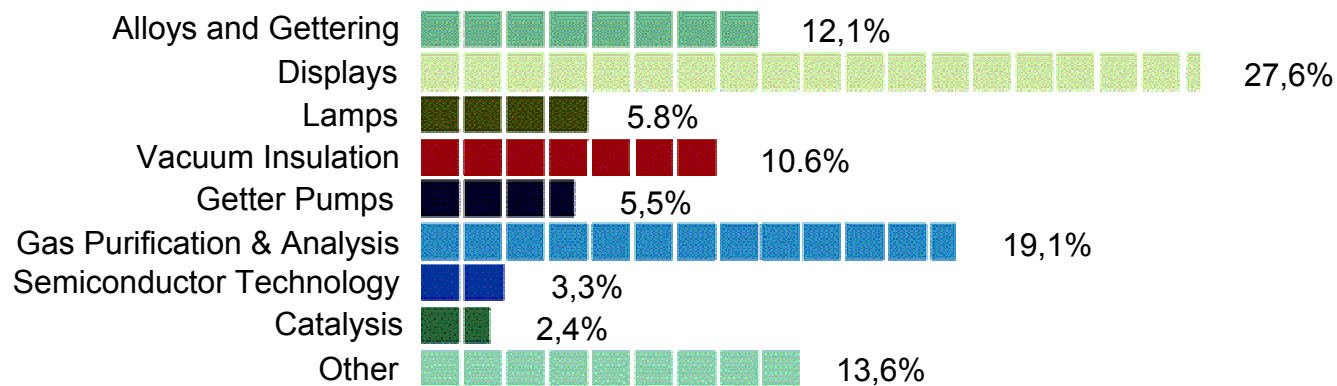
Research & Innovation



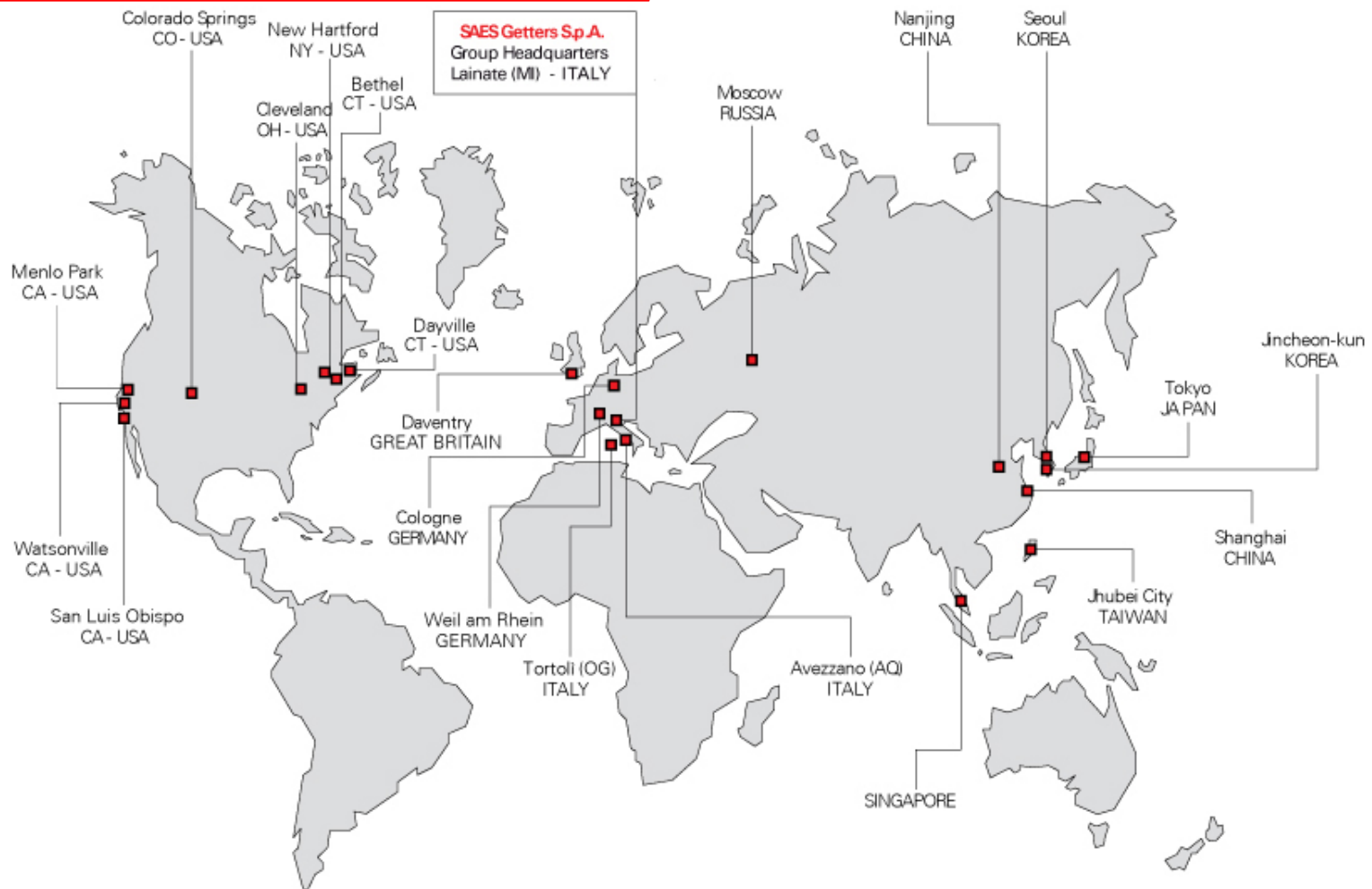
- About 10% of net consolidated sales allocated to R&I activities every year
- State-of-the-art corporate laboratories covering an area of over 3,300 sq.mt.
- Nearly 100 people committed to investigating problems, developing proposals and testing solutions

Intellectual Property: a Competitive Asset

Over 300 inventions have been patented by the Group in 70 years of activity, in the following business segments:



Global Presence



The SAES Getters Group Organization

The SAES Getters Group serves customers through three global **Business Units** (BU).



Each Business Unit addresses different markets and applications, aiming at the best customer satisfaction through the support of a worldwide-based sales and service network.

Business Organization

- **Information Displays Business Unit**

Components based on the getter technology and used in displays (liquid crystal displays and cathode ray tubes)

- **Industrial Applications Business Unit**

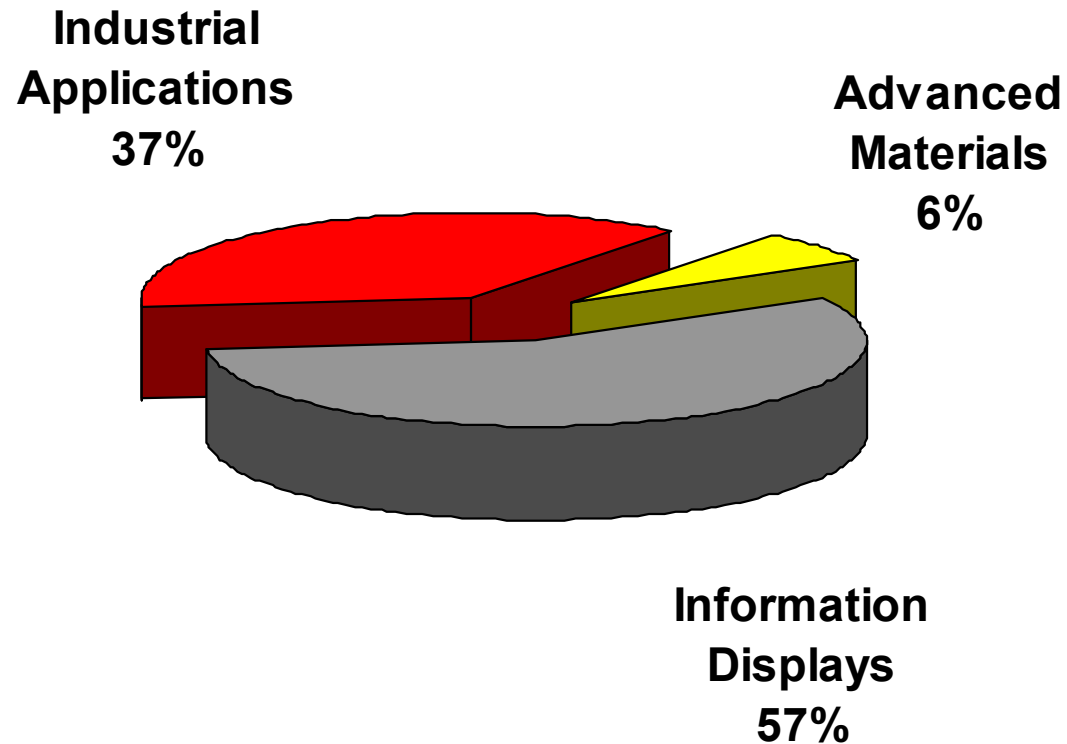
Innovative getter products and metal dispensing solutions supporting a wide variety of industrial applications (lamps, electronic devices, vacuum systems and vacuum thermal insulations) and capital equipment employed primarily in the semiconductor industry for pure gas handling

- **Advanced Materials Business Unit**

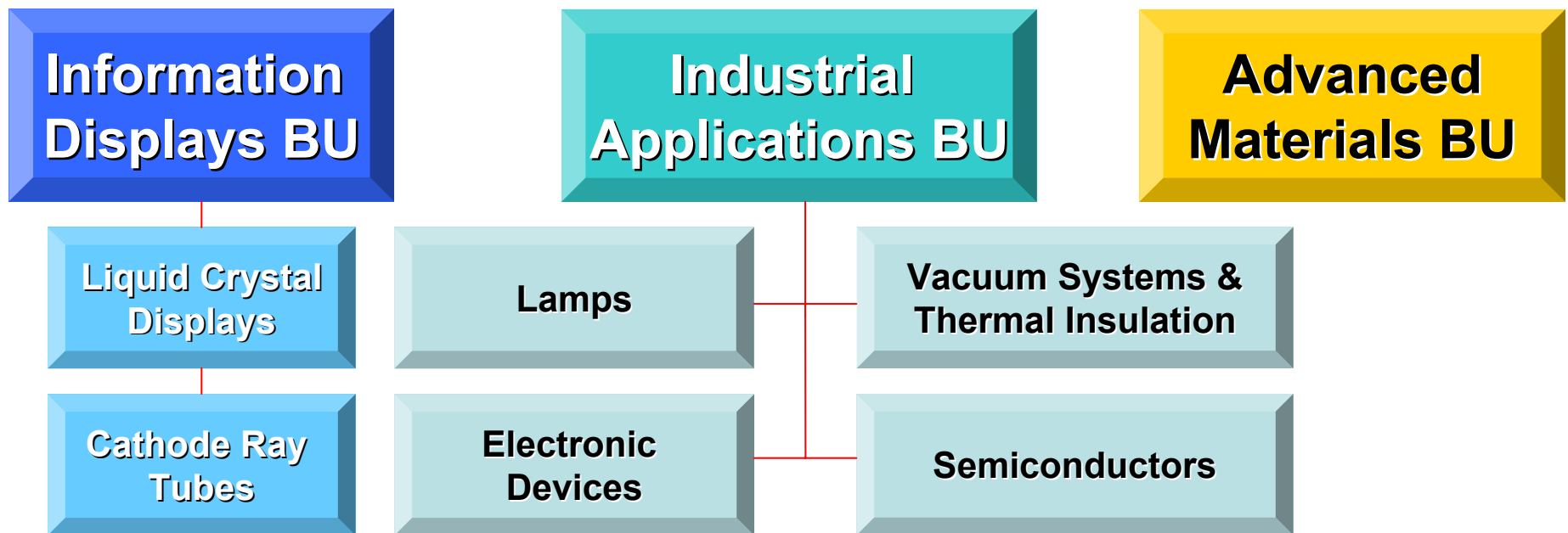
Advanced materials BU provides some of the most innovative technologies: optical crystals, shape memory alloys, getter thin films for wafer-level MEMS and highly sophisticated getters/dryers for Plasma Displays, Field Emission Displays (FEDs) and Organic Light Emitting Diodes (OLEDs)

1H08 Consolidated Sales

by Business Unit



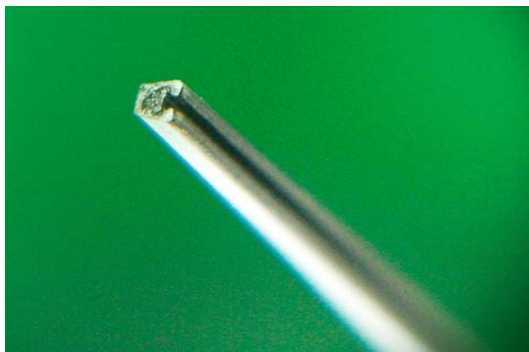
Business Organization



Liquid Crystal Displays

SAES Getters serves the LCD Panels industry with advanced and unique products, specifically **Mercury Dispensers** for Cold Cathode Fluorescent Lamps (CCFL) used for LCD Backlighting

- ❑ LCD Backlight systems are based on an array of thin Fluorescent Lamps that require a minimum amount of mercury inside to generate light
- ❑ SAES Getters products are manufactured with a proprietary design and process that allow a very precise mercury dosing inside CCFLs, in compliance with the very stringent regulations aiming at the minimal environmental impact
- ❑ 1H08 sales: 41 M€, 50% of total 1H08 Group sales (41.5 M€ in 1H07)



Cathode Ray Tubes

In spite of a declining market, Cathode Ray Tube (CRTs) are still used in large quantities in the Emerging Countries. SAES Getters is the CRT industry's largest provider of **barium based getters**

- In-house vertically integrated manufacturing processes
- A controlled risk management policy based on production at 2 manufacturing facilities
- Excellent quality and competitive price
- 1H08 sales: 5.6 M€, 7% of total 1H08 Group sales (9.5 M€ in 1H07)



Lamps

SAES Getters is the leading supplier of high quality, innovative non-evaporable **getters for Discharge Lamps** and **mercury dispensers for Linear Fluorescent Lamps** .

These products are the key solutions for the very demanding lamp industry, capable to ensure vacuum maintenance and highly pure filling gas. Major applications are:

- Street lighting
- Commercial lighting
- Industrial and domestic lighting



- 1H08 sales: 6.1 M€, 8% of total 1H08 Group sales (5.9 M€ in 1H07)

Electronic Devices

SAES Getters offers solutions for an extremely diversified range of devices which require either vacuum or a high purity rare gas atmosphere.

Main targeted market segments:

- Avionics (Laser Gyroscopes)
- Medical (X-Ray Tubes)
- Security & defense
- Telecom & datacom
- Automotive
- Solar energy (Solar collectors)



- 1H08 sales: 11.6 M€, 14% of total 1H08 Group sales (8.8 M€ in 1H07)

Vacuum Systems & Thermal Insulation

SAES expertise in gas-surface interaction, vacuum technology, out gassing and permeation of materials has led SAES Group to the development and production of **non-evaporable getter pumps, sputtered getter coatings and solutions in vacuum thermally insulated devices**

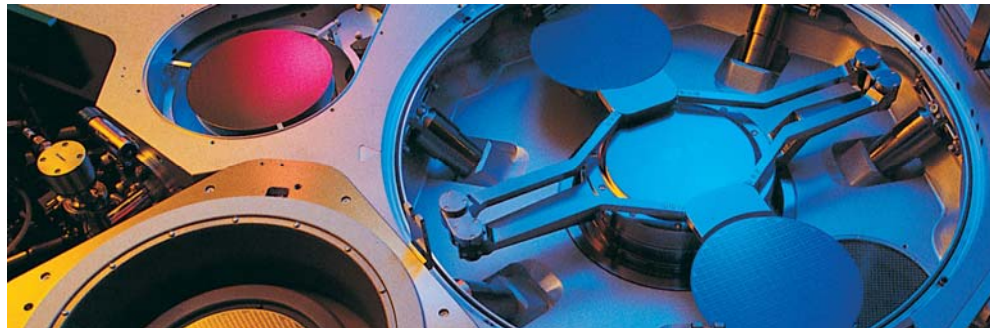
- Vacuum systems for material characterization and processing
- Particle accelerators
- Cryogenic applications

- 1H08 sales: 2.7 M€, 3% of total 1H08 Group sales (2.4 M€ in 1H07)



Semiconductors

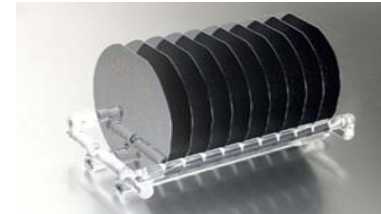
Providing advanced purification for **ultra-high purity bulk gases** and for **specialty gases**, as well as in-situ purification for processing tools, SAES Pure Gas – a member company of the SAES Getters Group – supports the semiconductor and other hi-tech industries.



□ 1H08 sales: 9.5 M€, 12% of total 1H08 Group sales (11.8 M€ in 1H07)

Advanced Materials

Getters for MEMS: thin film getter based products obtained by means of sputtering technology. Getter films deposited onto MEMS cap-wafers ensure the vacuum level in MEMS needed to improve the reliability and to lengthen the lifetime of the final device



Shape Memory Alloys: shape memory and super elastic alloys for niche high-technology applications, mainly medical and automotive. In-house vertically integrated process, from ingot to SMA components manufacturing, is SAES Getters' distinctive mark



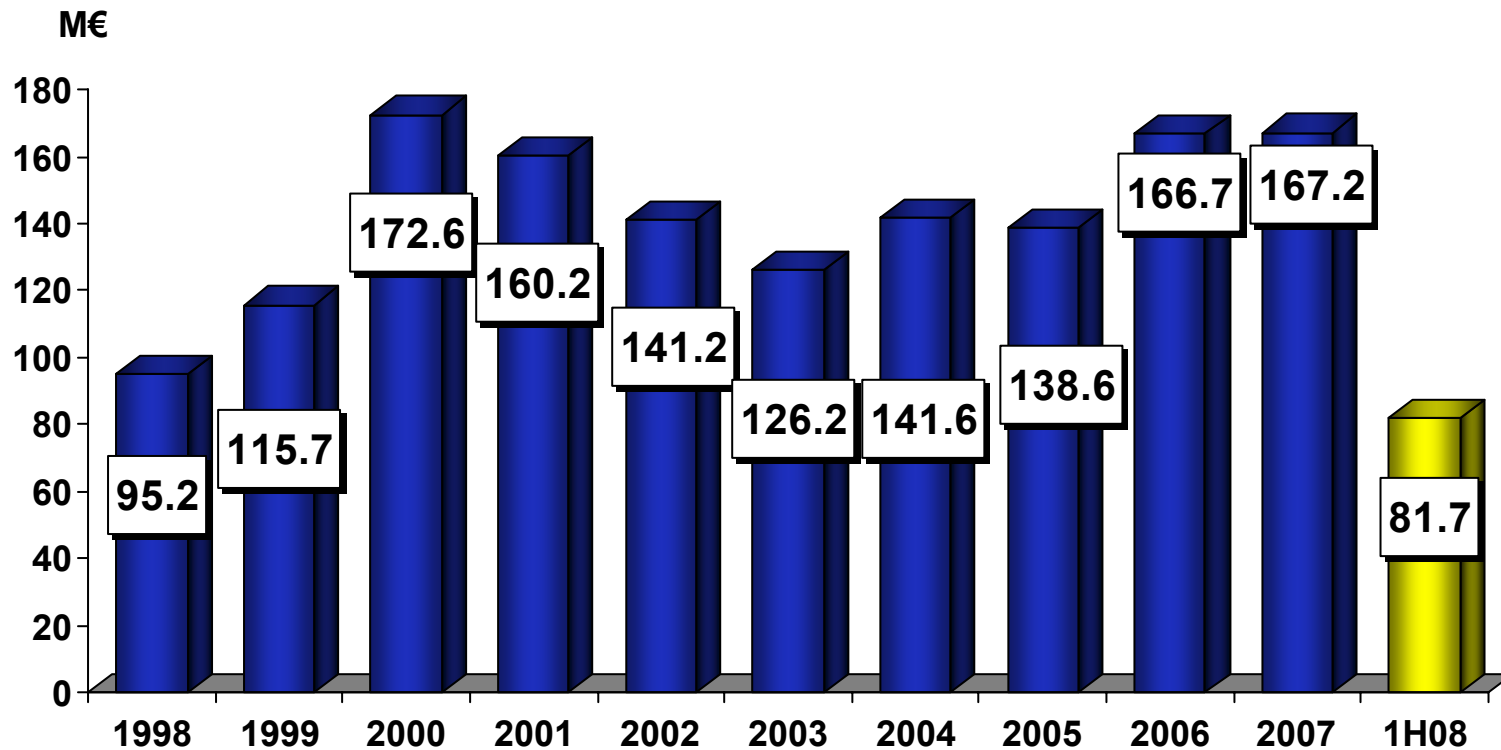
Optoelectronic Materials: advanced optical crystals for optoelectronic devices, industrial lasers and diagnostic PET machines



Flat Panels: highly sophisticated getters and dryers for Plasma Displays, Field Emission Displays (FEDs) and Organic Light Emitting Diodes (OLEDs)

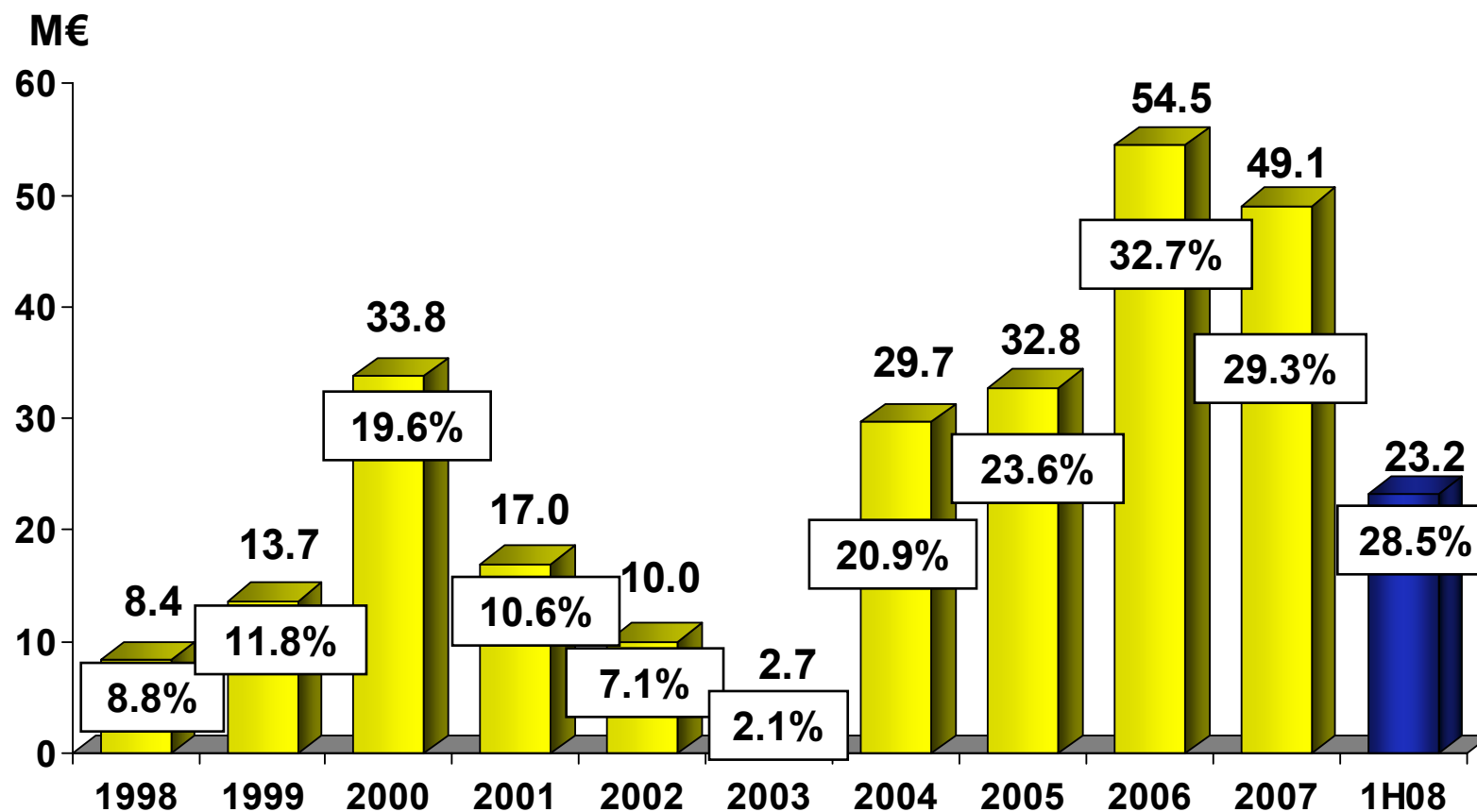
□ 1H08 sales: 5.2 M€, 6% of total 1H08 Group sales (1.8 M€ in 1H07)

Consolidated Sales



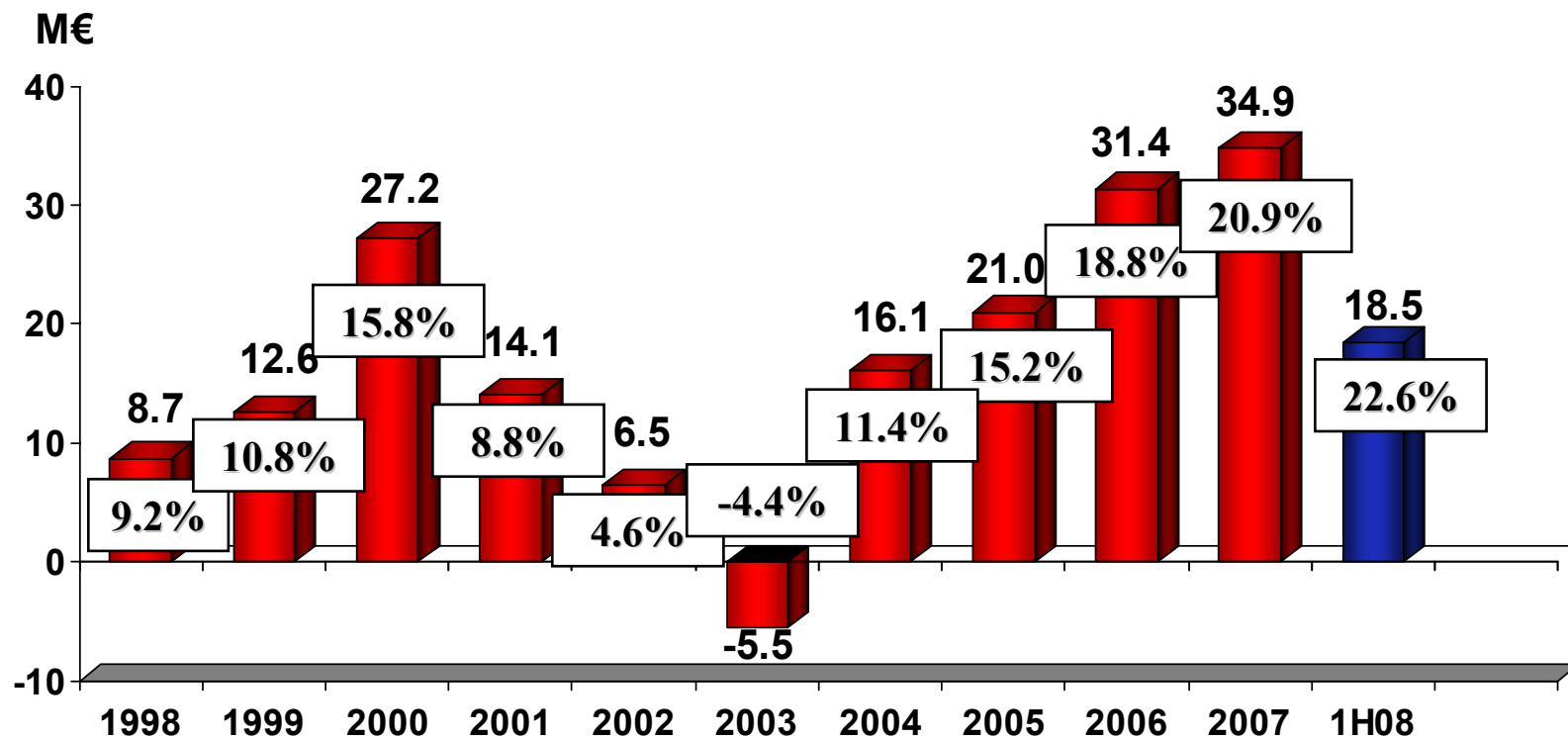
1998-2003 data compliant to Italian GAAP; 2004-2008 data compliant to IFRS

Consolidated Operating Income (% on net sales)



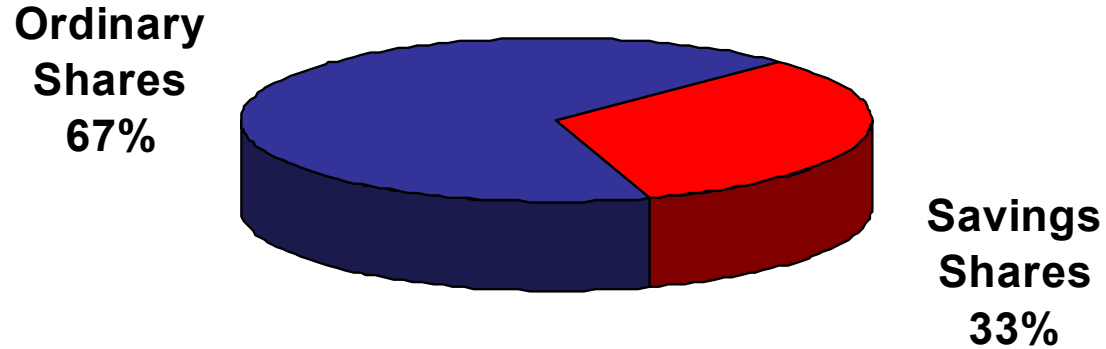
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Consolidated Net Income (% on net sales)



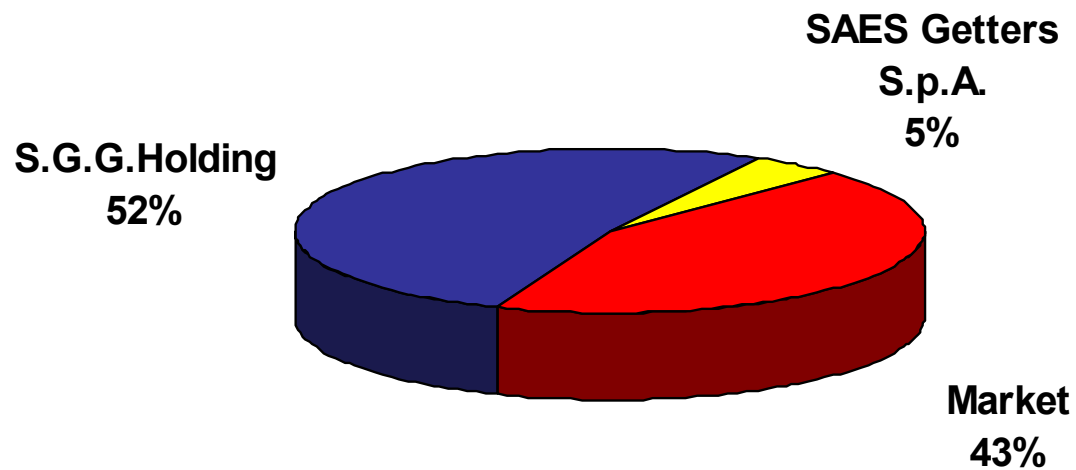
1998-2003 data compliant to Italian GAAP; 2004-2008 data compliant to IFRS

Capital Structure



Ordinary Shares	Savings Shares
# 15,271,350	# 7,460,619

Ordinary Shareholders



	S.G.G. Holding	SAES Getters S.p.A.	Market	Total
Number of shares	7,958,920	700,000	6,612,430	15,271,350
	52.12%	4.58%	43.30%	100.00%

Attestation

The Officer Responsible for the preparation of corporate financial reports of SAES Getters S.p.A. certifies that, in accordance with the second subsection of art. 154bis, part IV, title III, second paragraph, section V-bis, of Legislative Decree February 24, 1998, no. 58, the financial information included in the present document corresponds to book of account and book-keeping entries.

The Officer Responsible for the preparation of corporate financial reports
Michele Di Marco

Thank you
for your attention

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we support your innovation

