



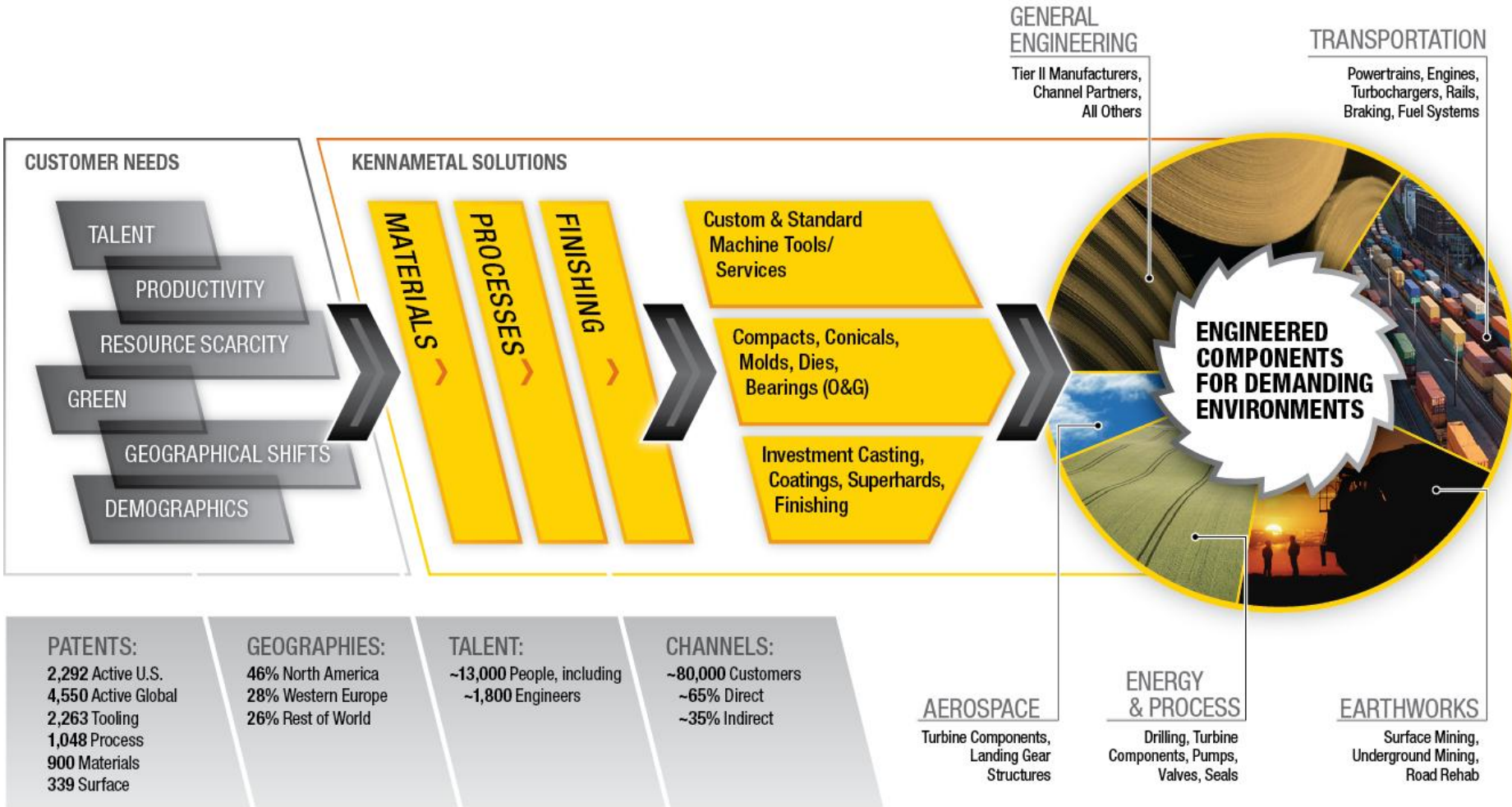
Kennametal Overview

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2ND ANNUAL
ENERGY & INNOVATION
CONFERENCE



Mission: Deliver Productivity to Customers In Demanding Environments



PATENTS:

2,292 Active U.S.
4,550 Active Global
2,263 Tooling
1,048 Process
900 Materials
339 Surface

GEOGRAPHIES:

46% North America
28% Western Europe
26% Rest of World

TALENT:

~13,000 People, including
~1,800 Engineers

CHANNELS:

~80,000 Customers
~65% Direct
~35% Indirect

Energy & Process Market: Significantly Enhanced With Stellite Solutions



Growth Drivers

- Global Energy Demand
- Emergence of Fracking
- Environmental Concerns
- Increase Abrasive Environments
- Enhanced Reliability/ Performance
- Regulations and Clean Tech

Initiatives

- Regionalized Production Capability
- Surface Treatment Technologies
- Wear Solutions For Water
- Stellite Components, Materials And Coatings
- Corrosion Resistant Solutions
- Deep Well Drilling Abrasive Solutions

Strategies

Wear

- Technology Development With Customers

Reconditioning

- Field Replacement/ Aftermarket Life Extension

Emerging Markets

- China, EMEA Expansion

Power Turbines



Component Blades and Coatings

Extruder Barrels



Improved Wear Capabilities

Deep Well Drilling



High Abrasives/Corrosion

Portfolio of Advanced Materials solutions for Demanding Environments